

L'Année PhiLanthropique

The PhiLanthropic Year

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PhiLab

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À propos du PhiLab | About PhiLab

Le Réseau canadien de recherche partenariale sur la philanthropie (PhiLab), anciennement Laboratoire montréalais de recherche sur la philanthropie canadienne, a été pensé en 2014 dans le cadre de la conception de la demande de financement du projet développement de partenariat CRSH intitulé « Innovation sociale, changement sociétal et Fondations subventionnaires canadiennes ». Ce financement a été reconduit en 2018 sous le nom d'« Évaluation du rôle et des actions de fondations subventionnaires canadiennes en réponse à l'enjeu des inégalités sociales et des défis environnementaux ». Depuis ses débuts, le Réseau constitue un lieu de recherche, de partage d'information et de mobilisation des connaissances des fondations canadiennes. Des recherches conduites en partenariat permettent la coproduction de nouvelles connaissances dédiées à une diversité d'acteurs : des représentants gouvernementaux, des chercheurs universitaires, des représentants du secteur philanthropique et leurs organisations affiliées ou des partenaires.

Le Réseau regroupe des chercheurs, des décideurs et des membres de la communauté philanthropique à travers le monde afin de partager des informations, des ressources et des idées.

The Canadian network of partnership-oriented research on philanthropy (PhiLab), previously called the Montreal Research Laboratory on Canadian philanthropy, was thought up in 2014 as part of the conception of a funding request by the NRCC partnership development project called "Social innovation, social change, and Canadian Grantmaking Foundations". From its beginning, the Network was a place for research, information exchange and mobilization of Canadian foundations' knowledge. Research conducted in partnership allows for the co-production of new knowledge dedicated to a diversity of actors: government representatives, university researchers, representatives of the philanthropic sector and their affiliate organizations or partners.

The Network brings together researchers, decision-makers and members of the philanthropic community from around the world in order to share information, resources, and ideas.



Social Sciences and Humanities
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 sciences humaines du Canada



À propos de L'Année PhiLanthropique

Par : **Jean-Marc Fontan et Peter R. Elson**

Codirecteurs du PhiLab

Codirecteurs de publication



L'Année PhiLanthropique est une publication spécialisée dans la diffusion de connaissances scientifiques et professionnelles dans le domaine de la philanthropie et plus précisément de la philanthropie subventionnaire. La revue répond au besoin de rendre disponible, en français et en anglais, des connaissances principalement produites ou mises en valeur par des activités scientifiques réalisées au sein du Réseau canadien de recherche partenariale sur la philanthropie (PhiLab).

L'Année PhiLanthropique publie des travaux de nature scientifique ou professionnelle répondant aux exigences de base de l'édition scientifique. La revue dispose d'un comité de lecture et de politiques éditoriales qui assurent un niveau de qualité certain aux textes qui y sont publiés. Ces derniers prennent différentes formes – articles, chroniques, comptes rendus critiques – et s'inscrivent dans un créneau qui se situe entre les publications scientifiques formelles et informelles. Il s'agit donc de textes qui, tout en respectant les normes éthiques de la production scientifique et professionnelle, se veulent plus courts – une dizaine de pages – et plus légers (moins grande emphase sur les dimensions méthodologiques et plus sur les résultats ou l'analyse) que la moyenne des productions scientifiques.

Produite une fois par année (hors éditions spéciales), chaque numéro de la revue est pris en charge par une équipe éditoriale différente rattachée au PhiLab. L'équipe, en mode direction, est chargée de la conception, de la production et de la gestion d'un appel à contribution.

En publiant L'Année PhiLanthropique nous nous assurons d'agir en complémentarité avec une offre de publications scientifiques, ou visant le grand public, déjà existante. En se voulant accessible en ligne et offerte gratuitement, la revue ouvre la voie à la diffusion de contenus générés par ou découlant d'activités de recherche majoritairement conduites en partenariat avec des acteurs de l'écosystème philanthropique.

L'Année PhiLanthropique s'inscrit dans la stratégie globale mise en place par PhiLab afin de mieux faire connaître les réalisations et enjeux de l'écosystème philanthropique canadien tout en ouvrant la voie à sa mise en comparaison avec des pratiques existantes ailleurs dans le monde. Enfin, rappelons que la création de notre revue n'aurait pas été possible sans l'appui du Conseil de recherches en sciences humaines du Canada (CRSH).

Jean-Marc Fontan et Peter R. Elson, de l'Université de Victoria, sont codirecteurs des subventions partenariales CRSH obtenues pour les périodes 2013- 2017 et 2018-2024. À titre de codirecteurs, ils veillent à la réalisation et à la coordination des activités de recherche et de valorisation des connaissances inscrites dans les programmes de recherche menés en partenariat et soutenus financièrement par le CRSH et les partenaires du projet. Jean-Marc Fontan est aussi directeur de la Chaire de recherche sur la méthodologie et l'épistémologie de la recherche partenariale et membre régulier du Centre de recherche sur les innovations sociales. Enfin, il codirige l'incubateur universitaire éponyme de cette organisation (IUPE).

About The PhiLanthropic Year

By: **Jean-Marc Fontan and Peter R. Elson**

Co-directors of the PhiLab Network

Publication Co-directors

The PhiLanthropic Year is a journal that specializes in the transmission of scientific and professional knowledge within the philanthropic sector, and more specifically, grantmaking philanthropy. The journal meets the need of rendering available, in French and English, knowledge mainly produced by or highlighted by the scientific activities that take place within the Canadian Philanthropy Partnership Research Network (PhiLab).

The PhiLanthropic Year publishes scientific and professional articles that meet the basic requirements of scientific publication. The journal has a peer-reviewed committee as well as basic editorial guidelines that ensure a quality standard for the texts it publishes. These latter take on different forms - articles, chronicles, critical book reviews- and find themselves somewhere between formal and informal scientific articles. These texts, while respecting the ethical norms of scientific and professional publications, are shorter - a dozen pages or less - and lighter (less emphasis on the methodological aspects and more on the results or analysis) than your average scientific publication.

Published annually, each issue is taken in charge by a different editorial team that is connected to PhiLab. The team, from a management point of view, is responsible for the design as well as the creation and management of a call for contributions. By publishing The PhiLanthropic Year, we make sure to act as a complement to the existing offer of scientific literature and publications directed to the general public. By being available online and offered free of charge, the journal paves the way to the dissemination of content generated by or stemming from research mainly conducted in partnership with actors of the philanthropic ecosystem.

The PhiLanthropic Year is part of a global strategy implemented by PhiLab to spread awareness of the successes as much as of the issues of the Canadian philanthropic ecosystem while paving the way for comparisons with existing practices from around the world. Finally, let us recognize that the creation of our journal could not have been possible without the support of the Social Sciences and Humanities Research Council of Canada (SSHRC).

Jean-Marc Fontan and Peter R. Elson, of Victoria University, are the co-directors of the SSHRC partnership grants obtained for 2013-2017 and 2018-2024. As co-directors, they oversee the implementation and coordination of research and knowledge valuation activities included in the research programs led in partnership with and financially supported by the SSHRC and the project's partners. Jean-Marc is also director of the Research chair on methodology and epistemology of partnership-based research and a regular member of the Social innovation research center. Finally, he co-directs the university incubator eponymous to this organization (IUPE).



Équipe éditoriale



En tant que co-coordonnatrice du PhiLab, **Katherine Mac Donald** est responsable pour tout ce qui a trait aux communications du Réseau, que ce soit à l'interne ou à l'externe. Ceci inclut la gestion du site web, de l'infolettre, des médias sociaux, des publications, etc. De plus, elle est responsable des relations avec les membres et partenaires afin d'en assurer une meilleure mobilisation.

Katherine fait partie du secteur caritatif depuis bientôt vingt ans. Étant bénévole au sein de plusieurs organismes depuis le secondaire, elle a commencé à travailler en 2008 à la SPCA de Montréal dans les services directs au public. Elle a ensuite suivi sa passion pour les pratiques durables au programme de Développement durable de l'Université McGill. Plus tard, elle a eu un poste en tant que coordonnatrice de la collecte de fonds et des communications dans un organisme pour la protection des droits des animaux. Son intérêt pour le développement durable, de pair avec ses habiletés de collecte de fonds, l'ont amené à poursuivre ses études à l'Université de Montréal au Certificat en gestion philanthropique. Maintenant, elle met à service ses années d'expériences dans le secteur philanthropique en tant que consultante.

Sare Nalbantoğlu Aslankılıç est candidate au doctorat en sociologie à l'Université du Québec à Montréal (UQAM). Pendant ses études en sociologie et en radio, cinéma et télévision, elle a commencé ses premières activités de bénévolat au sein d'une organisation locale et communautaire pour soutenir les communautés défavorisées et/ou déplacées de la ville. Depuis 2016, dans de nombreux projets locaux, elle a agi en tant que facilitatrice de la cohésion sociale et de l'intégration sociale, membre du conseil d'administration et gestionnaire de projet. Parallèlement à ses propres intérêts, son mémoire portait sur le rôle des organisations non gouvernementales œuvrant pour l'intégration socio-économique des réfugiés. En tant qu'agente aux communications depuis janvier 2021, Sare est responsable de la visibilité et de la qualité du contenu publié par le Réseau canadien de recherche partenariale sur la philanthropie (PhiLab). Elle participe à la gestion des plateformes de médias sociaux, à la création de contenu graphique pour divers documents, y compris des rapports de recherche, des publications, des infographies, des affiches et à la conception des infolettres mensuelles.



Artiste principale pour cette édition



Sam Design

Samantha Giroux est une graphiste et stratège visuelle spécialisée dans la conceptualisation de projets axés sur l'humain et sa relation avec son environnement. À travers ses créations colorées et dynamiques, Samantha aide les entreprises à éduquer, à susciter l'engagement et à établir des liens avec leur communauté, contribuant ainsi à créer un avenir plus durable, bienveillant et inclusif pour tous.

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Editorial team



As PhiLab's co-coordinator, **Katherine Mac Donald** is responsible for all of the Network's communications, be it external or internal. This includes managing the website, newsletter, social media, publications, etc. In addition, she is responsible for building connections among and between PhiLab's members and partners to ensure a better mobilization strategy.

Katherine has been part of the nonprofit sector for close to twenty years. As a volunteer for many organizations since highschool, she started working at the Montreal SPCA in 2008 in direct services to the public. She then followed her passion for sustainable practices in the Environment and Development program at McGill University. Later, she landed a position as Fundraising Coordinator at an animal rights organization. Her combined interest of sustainable development and fundraising led her to complete a certificate in nonprofit management at Université de Montréal. Now, she puts her many years of philanthropic experience to the service of nonprofits as a consultant.

Sare Nalbantoğlu Aslankılıç is a Ph.D. candidate in Sociology at the Université du Québec à Montréal (UQAM). During her studies in Sociology and in Radio, Cinema and Television, she started her first volunteering activities within a local and community-based organization to support disadvantaged and/or displaced communities in the city. Since 2016, in many local projects, she has acted as a social cohesion and social integration facilitator, board member and project manager. In parallel to her own interests, her thesis focused on the role of non-governmental organizations working for the socio-economic integration of refugees. As a Communications Officer since January 2021, Sare is responsible for the visibility and quality of content published by the Canadian Philanthropy Partnership Research Network (PhiLab). She is involved in managing social media platforms, creating graphic content for various materials including research reports, publications, infographics, posters and designing monthly newsletters.



Edition's Main Artist



Samantha Giroux is a graphic designer and visual strategist specializing in conceptualizing projects focused on

humanity and its relationship with the environment. Through her colorful and dynamic creations, Samantha helps businesses educate, engage, and establish connections with their community, thereby contributing to creating a more sustainable, caring, and inclusive future for all.

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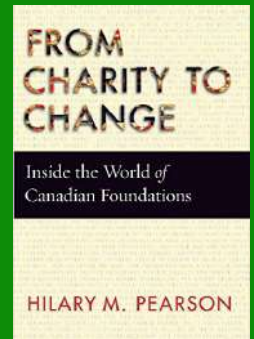


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ÉDITORIAL | EDITORIAL



EDITORIAL

PhiLab: A bridge between Academia, the Philanthropic Sector and Policies

By Jean-Marc Fontan and Peter R. Elson

Co-directors of the PhiLab Network

Publication Co-directors



The beginning of the Canadian Research Partnership Network on Philanthropy in 2018 marked the start of a rich and fruitful collaboration. Over the span of six years, we, as academic researchers and professionals in the philanthropic field, have been able to develop and deepen our understanding of the Canadian grant-making philanthropy ecosystem. Certainly, there is still much to do. From a territorial approach - the creation of four regional Hubs (Atlantic, Quebec, Ontario, and Western Canada) - and sectoral, with studies related to philanthropies in indigenous and sub-Saharan African environments, we have explored a variety of subjects while contributing to the enhancement of existing knowledge.

In 2022, our "Re-imagining Philanthropy" conference was intended as a moment of reflection on the learnings resulting from the research carried out in each of the major regions covered by our Network of collaborations. This synthesis indicated to us that an additional effort should be undertaken to enhance the capacities of the charitable sector in terms of social and environmental justice. We reiterated our desire to understand the Canadian philanthropic landscape, both in its national peculiarities and in its territorial and sectoral singularities.

As the first research partnership on Canadian philanthropy co-funded by the Social Sciences and Humanities Research Council (SSHRC) and PhiLab partners, we have filled an important relational gap between the academic world and that of grant-making philanthropy. In doing so, we have co-generated knowledge through the production of books, articles,

conferences, podcasts, videos and edited the first annual report on Canadian philanthropy: the PhiLanthropic Year.

To mark the end of the SSHRC partnership grant and the beginning of a new phase of work for PhiLab, we decided to dedicate the 2024 edition of the PhiLanthropic Year to a culmination of the work begun with the national conference of 2022.

Continuity is established by the presentation of a synthesis of work on the major themes addressed by our research partnership teams. This synthesis follows the three main work objectives of our Network, namely: to deepen our knowledge of the philanthropic ecosystem; to situate the contribution of philanthropy in terms of social justice (fight against inequalities) and environmental justice (ecological transition); and, to better understand the interventions carried out by medium-sized foundations.

The "Re-imagining Philanthropy" conference presented an invitation to the sector to go beyond a focus on efficiency, effectiveness, legitimacy and relevance and address broader public policy issues. Not surprisingly, therefore, we dedicate a section of this issue of the PhiLanthropic Year to the link between the sector and the State, from the angle of the evolution of public policies.

We hope that this forward-looking synthesis will add value to our collective representation of the Canadian philanthropic ecosystem.

ÉDITORIAL

Le PhiLab : un pont entre l'université, le secteur philanthropique et la politique

Par Jean-Marc Fontan et Peter R. Elson

Co-directeurs du PhiLab

Co-directeurs de publication



Le début du Réseau canadien de recherche partenariale sur la philanthropie, en 2018, marque le début d'une collaboration riche et fructueuse. Sur l'espace de six années, nous avons été en mesure, chercheur·e·s universitaires et professionnel·le·s du milieu philanthropique, de développer et d'approfondir les connaissances sur l'écosystème canadien de la philanthropie subventionnaire. Certes, il reste beaucoup à faire. À partir d'une approche territoriale – la création de quatre Hubs régionaux (Atlantique, Québec, Ontario, et Ouest canadien – et sectorielle, avec des études relatives aux philanthropies en milieux autochtone et d'Afrique sub-saharienne, nous avons exploré une variété de sujets tout en contribuant à la valorisation de savoirs existants.

En 2022, la réalisation du colloque « *Ré-imaginer la philanthropie* » se voulait un moment de réflexion sur les apprentissages découlant des recherches réalisées dans chacune des grandes régions couvertes par notre Réseau de collaborations. Cette synthèse nous indiquait qu'un effort supplémentaire devrait être envisagé afin de bonifier les capacités d'agir du secteur de la bienfaisance en matière de justice sociale et de justice environnementale. Certes, nous indiquions aussi qu'il importait de parfaire notre compréhension du paysage philanthropique canadien, tant dans ses particularités nationales que dans ses singularités territoriales et sectorielles.

En tant que premier partenariat de recherche sur la philanthropie canadienne co-financé par le Conseil de recherche du Canada (CRSH) et les partenaires de PhiLab, nous avons comblé un vide relationnel important entre le milieu universitaire et celui de

la philanthropie subventionnaire. Ce faisant, nous avons cogénéré des connaissances via la production de livres, d'articles, de conférences, de balados, de vidéos et édité la première revue scientifique sur la philanthropie canadienne : l'Année phiLanthropique.

Pour marquer la fin de la subvention partenariale du CRSH et le début d'une nouvelle phase de travail pour PhiLab, nous avons décidé de consacrer l'édition 2024 de l'Année phiLanthropique à une poursuite du travail amorcé avec le colloque national de 2022.

D'une part, la continuité s'établit par la présentation de travaux synthèses sur les grandes thématiques abordées par nos équipes partenariales de recherche. Cette synthèse suit les trois grands objectifs de travail de notre Réseau, à savoir : approfondir nos connaissances sur l'écosystème philanthropique; situer l'apport de la philanthropie en matière de justice sociale (luttres aux inégalités) et de justice environnementale (transition écologique); et, mieux connaître les interventions réalisées par des fondations de moyenne importance.

Le symposium « Re-imaginé la philanthropie » a invité le secteur à aller au-delà de l'efficience, de l'efficacité, de la légitimité et de la pertinence et à se pencher sur des questions de politiques publiques plus larges. Pas étonnant, dès lors, que nous consacrons une section du présent numéro de l'Année PhiLanthropique à l'enjeu du lien entre le secteur et l'État, sous l'angle de l'évolution des politiques publiques.

Nous espérons que cette synthèse à saveur prospectiviste apportera une valeur ajoutée à notre représentation collective de l'écosystème philanthropique canadien.

ENTREVUE | INTERVIEW





ENTREVUE | INTERVIEW

Évaluation du projet PhiLab

Les rôles et fonctions qu'on lui attribue

Par Laurence Croteau, diplômée à la maîtrise en sciences de l'environnement de l'UQAM et membre étudiante du CRISES, de l'ISE et du PhiLab



Laurence Croteau est diplômée à la maîtrise en sciences de l'environnement de l'Université du Québec à Montréal (UQAM). Elle est membre étudiante du Centre de recherche sur les innovations sociales (CRISES), de l'Institut des sciences de l'environnement (ISE) et du PhiLab. Elle travaille sur l'innovation sociale et l'initiative locale citoyenne pour une meilleure gestion des déchets en milieu insulaire touristique. Elle s'intéresse particulièrement à l'écocitoyenneté, le développement de capacités collectives et l'implication citoyenne dans les transformations écosociales.

À l'approche de la fin du financement CRSH, le Comité de direction de PhiLab a mandaté la production d'une évaluation présentant le point de vue des membres du Réseau PhiLab sur le travail de recherche participative effectué au fil des six dernières années (2018-2024).

L'objectif était de dégager un bilan et sonder les différent·e·s participant·e·s du Réseau (étudiant·e·s, chercheur·e·s et partenaires) afin de dégager les éléments forts de cette expérience que ses limites.

L'exercice a permis de dégager, à partir d'un sondage comportant une dizaine de questions, une évaluation impressionniste et légère du travail réalisé. Cette première phase a été suivie d'une enquête qualitative reposant sur des entrevues auprès de membres du Réseau. Les fruits de cette démarche ont permis de structurer une analyse sous l'angle des rôles et des fonctions qui incombent au PhiLab, une appréciation du travail réalisé et d'identifier des pistes de travail et de restructuration pour l'avenir.

Entre la première et la deuxième phase, la Fondation Milena et Lino Saputo nous a suggéré de compléter le travail évaluatif mandaté par le Comité de direction en abordant l'enjeu des retombées concrètes ou de l'impact de nos activités sur les organisations membres du Réseau. Nous avons retenu cette proposition qui a donné lieu à une troisième phase, plus exhaustive, dont les résultats seront présentés dans un autre rapport à publier au printemps 2025.

Nous présentons ici le fruit de la deuxième phase de travail.

Rappel des éléments clés du projet

Les objectifs généraux du PhiLab, tels que formulés dans la demande de financement déposée au CRSH sous le titre – *Évaluation du rôle des actions de fondations subventionnaires canadiennes en réponse à l'enjeu des inégalités sociales et des défis environnementaux* –, étaient les suivants.

- Produire et diffuser des connaissances nouvelles **sur la philanthropie canadienne** ainsi que des thèmes connexes (solidarité nationale et internationale, bénévolat, engagement communautaire, innovations sociales, etc.).
- Offrir un lieu de concertation et de coordination pour les activités de recherche.
- Favoriser l'émergence de nouvelles pistes de recherche fondamentale et appliquée.
- Être le point de rencontre de référence de partage et de mise en valeur des connaissances, des pratiques et des innovations sur la philanthropie pour l'ensemble des acteurs du milieu.
- Organiser des activités scientifiques et de transfert.
- Former des jeunes chercheur·e·s.

À ces objectifs étaient greffés quatre éléments constituant le cœur du programme et de l'approche de travail.

1. Parfaire la connaissance du paysage philanthropique canadien et québécois.
2. Documenter et illustrer l'apport de fondations subventionnaires en matière :
 - a. de justice sociale; et,
 - b. de justice environnementale.
3. Porter une attention particulière aux actions développées par des fondations de moyenne importance.
4. Développer une approche novatrice en matière de valorisation des connaissances.

Le programme de travail du Réseau PhiLab a été déployé à partir :

- de quatre centres régionaux de travail situés dans chacune des grandes régions du Canada;

- d'un centre sectoriel dédié à la recherche partenariale sur des questions et enjeux autochtones;
- d'une unité de recherche partenariale sur la philanthropie africaine; et, enfin,
- des noyaux de collaboration impliquant des chercheur·e·s situé·e·s aux États-Unis, au Brésil, au Chili, en Australie, en Espagne et en France.

La démarche évaluative

Rappelons que la démarche évaluative a pris place en deux phases.

Dans un premier temps, un sondage en ligne a été envoyé à l'automne 2023, à l'ensemble des membres du Réseau (Annexe 1). Nous avons reçu 31 réponses. De l'information découlant du sondage, une infographie a été produite qui résumait les faits saillants qui se dégageaient du sondage (Annexe 2).

Dans un deuxième temps, au début de l'hiver 2023-2024, des entretiens auprès de 16 personnes représentant les trois populations clés de notre Réseau, à savoir : les chercheur·e·s établi·e·s, les chercheur·e·s en formation et les partenaires impliqués dans nos différentes activités et modalités de travail. Ces personnes, par leur témoignage, ont partagé leurs représentations des rôles et des fonctions attribués au PhiLab.

Les informations découlant des entretiens ont été regroupées autour de quatre dimensions.

1. Le développement du secteur.
2. PhiLab comme laboratoire de proximité entre universités et acteurs de l'écosystème philanthropique canadien.
3. Production et diffusion des connaissances sur la philanthropie.
4. Formation de chercheur·e·s.

Sur chacune de ces dimensions, nous avons dégagé les points saillants en matière de contributions (principales et potentielles), de limites et de défis. Enfin, des propos recueillis, nous avons identifié des pistes d'action et un ensemble de recommandations.



1. Appui au développement du secteur

Les activités de recherche et de valorisation des connaissances réalisées par PhiLab ont mis des mots sur des pratiques, des intuitions, des visions et ont permis d'identifier les questionnements et les défis propres au secteur philanthropique. La production de nouvelles connaissances ou la valorisation de connaissances existantes ont eu pour effet d'animer les débats sur les pratiques des fondations et d'insuffler une plus grande réflexivité sur ces pratiques.

Les fondations avaient le réflexe de faire les choses par instinct. Le PhiLab est arrivé à un moment important où les fondations commençaient à se questionner sur leur approche, leurs pratiques d'investissement, leur place par rapport à l'État. PhiLab a permis de faire avancer la réflexion au sens large sur certains enjeux qui les concernent.
(Partenaire 4)

Dans un contexte où les connaissances sur la philanthropie demeurent limitées, il est indiqué un besoin de répondre à ce manque en générant des connaissances afin de permettre, auprès de différents publics, une meilleure compréhension du secteur philanthropique et des enjeux qui le traversent. Des partenaires ont adopté une posture mutualiste, sachant que tous les travaux ne répondraient pas nécessairement à leurs besoins spécifiques, mais qu'ils bénéficieraient à la communauté philanthropique au sens le plus large.

Pour les partenaires ayant le besoin de voir s'établir un espace réflexif critique, il est mentionné que

PhiLab a été en mesure de répondre à cette attente. Enfin, de façon globale ou spécifique, en lien avec des connaissances pratiques ou des réflexions critiques, les activités générées par PhiLab ont aidé le secteur à mieux se connaître et à être mieux compris.

Maintenant, sur la question relative au potentiel de PhiLab d'induire, par le biais de la production et de la diffusion de connaissances, des changements systémiques ou de faire évoluer positivement les politiques publiques, il se dégage les points de vue suivants.



Pour les partenaires ayant le besoin de voir s'établir un espace réflexif critique, il est mentionné que PhiLab a été en mesure de répondre à cette attente. Enfin, de façon globale ou spécifique, en lien avec des connaissances pratiques ou des réflexions critiques, les activités générées par PhiLab ont aidé le secteur à mieux se connaître et à être mieux compris.



Premièrement, être un catalyseur de changements systémiques n'est pas un rôle attribué d'emblée au PhiLab. Les changements systémiques résultent souvent de la convergence de plusieurs éléments. Attribuer le mérite à une seule entité et distinguer l'élément déclencheur est ardu.

Le Réseau a aidé à dynamiser le milieu philanthropique, à faire en sorte que les gens et le gouvernement aient plus de connaissances sur le milieu, mais on ne parle pas nécessairement de changements systémiques à ce stade-ci. C'est davantage un effet miroir sur les discussions qui se passent dans le secteur, sans que le PhiLab en soit l'élément déclencheur. (Partenaire 7)

Dès lors, si plusieurs facteurs contribuent aux changements systémiques, PhiLab aurait joué un rôle modeste à cet effet. Les travaux du PhiLab, notamment sur les rapports de pouvoir, sur la philanthropie basée sur la confiance, et sur les relations du secteur avec l'État ont été importants et sont mentionnés à plusieurs reprises comme des points forts du travail effectué par le Réseau. De plus, les points de vue des répondant.e.s convergent sur le fait que PhiLab a joué un rôle significatif dans le développement de conversations et qu'il est un outil pouvant être mis davantage à contribution.

Deuxièmement, en ce qui concerne son influence sur les politiques publiques, il est considéré que les travaux du PhiLab peuvent aider à mieux définir et mieux soutenir le secteur philanthropique auprès de l'État, mais que globalement les travaux de ce dernier ont eu une très faible influence. Pour que son influence croisse, il est suggéré un engagement plus clair du Réseau dans des activités de plaidoyer : comme la participation à des consultations publiques, la rédaction d'articles d'opinion et la sensibilisation des médias à certains enjeux clés. Cette influence de PhiLab devrait aussi permettre une visibilité accrue des enjeux philanthropiques auprès de l'opinion publique en général.

En ce sens, il a été suggéré que des initiatives de recherche réalisées avec des partenaires sociaux et axées sur des thèmes politiques pourraient servir de base à la défense des intérêts des partenaires sociaux et ainsi contribuer à l'élaboration ou à la bonification de politiques publiques.

De façon complémentaire, il est indiqué que le potentiel d'influence est davantage remarqué en ce qui a trait aux pratiques internes des fondations philanthropiques : donc au niveau organisationnel et institutionnel des fondations. Les recommandations de PhiLab, basées sur la recherche, incitent ces organisations à revoir ou à ajuster leurs stratégies de financement, leurs approches de collaboration ou encore leurs programmes philanthropiques.



2. Être un laboratoire de proximité dans un réseau pancanadien

Le PhiLab est un espace laboratoire exigeant de la proximité entre les parties prenantes des projets étudiés ou des thèmes abordés. Cet espace laboratoire favorise des rencontres productives entre le milieu académique et le secteur philanthropique pourvu qu'une relation de confiance ait été bien établie ou du moins qu'un potentiel existe en ce sens. Il est soulevé le fait que de travailler en réseau facilite la collaboration entre les différentes parties prenantes de projets, permettant un approfondissement des réflexions.

L'approche de recherche, fondée sur une relation proximale, est importante. Cette posture fait en sorte que de nombreux projets sont alignés avec les besoins du milieu. Il est question de laboratoire où les recherches portent sur des situations ou des expérimentations d'où sont extraits des questionnements portés conjointement par des fondations et le milieu de la recherche.

Il a été mentionné que la richesse de la recherche partenariale consiste dans l'alignement des préoccupations de l'un et des intérêts de l'autre. La relation entre chercheur.e.s et partenaires ne se limite pas à la participation à des recherches spécifiques. Il est clair que plusieurs partenaires ont bénéficié de la disponibilité de chercheur.e.s pouvant partager leurs expertises et apporter des retours réflexifs sur les activités de leur organisation. Ces moments de complicité, parfois informels, nourrissent un espace de transfert informel et d'analyse critique. Ils vivifient les processus et dynamiques de recherche.

Il y a quelque chose de très gratifiant dans le support que l'on peut offrir aux partenaires par nos recherches et nos rencontres avec eux. (Chercheur·e 5)

Les activités de réseautage sont vitales pour consolider le sentiment d'appartenance à quelque chose de commun, à savoir : l'écosystème philanthropique. Ces rencontres permettent une légèreté dans la création des liens et sont généralement grandement appréciées. Il est indéniable que PhiLab fait partie de l'écosystème philanthropique et qu'il en est une composante.

Il faut saluer le travail important qui a été fait auprès de fondations pour l'obtention du financement CRSH. Il est suggéré que ce processus de mobilisation par l'intéressement à l'approche et à la posture PhiLab soit reconduit pour les prochaines phases. PhiLab pourrait développer des liens avec de nouveaux partenaires, mais également voir à une mise à niveau des liens auprès de partenaires qui se sont éloignés. Un éloignement, est-il rappelé, souvent en lien avec le taux élevé de rotation du personnel cadre.

La valeur ajoutée du Réseau national

La valeur et la pertinence de travailler à l'échelle nationale sont reconnues par l'ensemble des répondant·e·s. Le projet s'est essentiellement développé par la volonté d'agir à l'échelle pancanadienne sans négliger l'importance des ancrages régionaux et locaux. Le réseau offre une connectivité entre les alliés de la philanthropie et permet l'apprentissage et le partage d'initiatives entre régions.

L'essentiel est de se parler au niveau pancanadien. Les règles, les politiques et les enjeux sont globaux. C'est ce qui est riche du réseau national, on se pose les mêmes questions à l'échelle du pays et on pourrait faire des avancées globales plutôt que chacun pour soi. (Partenaire 9)

Il a aussi été mentionné que les régions, hors des grands centres urbains, bénéficient grandement de l'accessibilité à un réseau national du fait qu'elles disposent de moins de liens de proximité avec des organisations souvent situées en zones métropolitaines. Le Réseau a d'ailleurs permis un premier contact entre des organisations régionales excentriques et d'importants joueurs régionaux et nationaux.



L'approche de recherche, fondée sur une relation proximale, est importante. Cette posture fait en sorte que de nombreux projets sont alignés avec les besoins du milieu. Il est question de laboratoire où les recherches portent sur des situations ou des expérimentations d'où sont extraits des questionnements portés conjointement par des fondations et le milieu de la recherche.



Il est également important de noter qu'il existe des spécificités et des caractéristiques propres aux provinces, aux grands centres et aux régions éloignées. Il semble crucial de considérer ces distinctions dans la manière de faire de la philanthropie, mais aussi dans la curiosité face au changement qui peut être plus présent à certains endroits plutôt qu'à d'autres.

Collaboration entre les centres régionaux : force et faiblesse

Plusieurs ont critiqué la faible collaboration entre les centres régionaux. Les raisons mentionnées sont multiples. D'une part, les projets transversaux au potentiel fort de collaboration entre les centres régionaux ont été rares. D'autre part, en implantant des centres régionaux, cette approche n'a pas favorisé le développement d'une vision d'ensemble à partir des

thématiques abordées dans les activités de recherche. S'en est suivi un développement de recherche en silos.

Face à cette situation, il est proposé que les expertises et préoccupations de recherche des chercheur·e·s de différents centres régionaux soient mobilisées autour de sujets transversaux, favorisant ainsi une dynamique de collaboration. Il est d'avis que le réseau bénéficierait d'un maillage plus fort entre chercheur·e·s en favorisant leur association autour de divers projets ou activités de recherche et de valorisation des connaissances.

Du côté des chercheur·e·s, il a été mentionné que la collaboration entre les centres régionaux avait été faible, mais que les relations se sont bien développées entre les chercheur·e·s d'un même centre régional. Cependant, bien que les relations n'étaient pas nécessairement très proches, les rencontres opérationnelles ont joué la fonction de communauté de pratiques et consolidé le sentiment de faire partie d'un ensemble.

Malgré cet effet positif, il est noté un manque de communication sur les opportunités de collaboration en recherche et en valorisation des connaissances, ce qui a parfois généré un sentiment « d'occasions manquées ». En apprenant à posteriori que des projets avaient eu lieu et donc que les possibilités de collaboration étaient passées, cela a parfois donné l'impression d'une dynamique de compétition plutôt que de collaboration.

Afin d'atténuer ce facteur irritant, il est proposé de développer un outil de communication coordonné, actualisé fréquemment, portant sur l'avancée des projets en cours et des opportunités à venir. Une présentation claire des opportunités de recherche et de valorisation répondrait également au désir des étudiant·e·s qui aimeraient s'impliquer davantage au sein du Réseau.

La rigueur et l'assiduité constante du travail de l'équipe à la coordination ont été largement saluées. Cependant, la coordination centralisée ne semble pas être une formule qui favorise la collaboration entre les centres régionaux. Comme les communications y sont centralisées, les centres régionaux ont eu le sentiment d'être dépendants et en attente d'instructions. Cela a renforcé le réflexe de travailler de façon autonome.

Il est proposé une structure de gouvernance où la coordination recenserait l'information sans déléguer

les tâches, cela améliorerait la collaboration entre les centres régionaux. Selon cette proposition, la coordination aurait plutôt la fonction de concentration et de diffusion, le devoir de recenser l'information et de la faire redescendre.

Des réalités multiples

Il est mentionné que la réalité ou la situation des parties prenantes au réseau sont différentes. Ceci relève certainement du fait que le milieu philanthropique est hétérogène. Du coup, les collaborations, dans les différentes recherches partenariales, ne sont pas uniformes et les niveaux d'engagement ne sont pas les mêmes.

Il est rappelé que les échelles de temps de la recherche en milieu universitaire ne correspondent pas nécessairement aux temporalités des partenaires. Cette situation entraîne parfois l'effet d'opérer à deux vitesses : rapide pour les partenaires et lente pour la recherche.

Il est noté l'importance de s'entendre au début du processus sur la temporalité et les conditions attenantes à la recherche scientifique. Pour les chercheur·e·s, ces derniers rappellent l'importance d'identifier des questions de recherche claires, de les problématiser et de les contextualiser. Le produit final rendra compte de ces éléments tout en dégageant les principaux résultats se dégageant de l'activité de recherche, lesquels ne sont pas nécessairement considérés utiles par les partenaires dans la forme présentée : rapports copieux rendant l'accessibilité difficile et l'utilisation ardue.

La recherche ne veut pas dire qu'elle peut agir comme consultante. Les organisations ont le réflexe de se tourner vers des consultants. Les chercheur·e·s répondent à des questions, mais ne sont pas là pour conseiller sur les actions. Il en revient à l'organisation de prendre des décisions. (Chercheur·e 2)

Les partenaires nous indiquent l'importance d'avoir des synthèses, de compter sur des indications claires sur des impacts ou des effets, ou encore de savoir comment traduire la recherche en des outils concrets.

Il est proposé, pour les prochaines phases du PhiLab, d'expérimenter et de systématiser une méthode de collaboration qui puisse réduire l'écart entre les deux attentes : de la démarche de recherche, d'un côté, au

plan de la rigueur scientifique, et, de l'autre, du besoin pragmatique de permettre une appropriation effective et adaptée de ses résultats par les partenaires.



3. Produire et diffuser des connaissances sur la philanthropie

Parmi les rôles attribués au PhiLab, un fondamental tient à produire et diffuser de nouvelles connaissances tout en étant innovant dans les façons de le faire. Il est clair que des activités ont fait état de l'évolution des différentes tendances au sein du milieu philanthropique tout en relayant différents points de vue critiques sur ces dernières.

Le fait de travailler sur des sujets encore peu étudiés a été apprécié. Les nouvelles connaissances trouvent alors leur pertinence auprès des professionnel-le-s du milieu philanthropique et dans certains cas peuvent avoir des impacts sur les organisations partenaires.

En encourageant la recherche et le partage d'idées novatrices, le réseau stimule l'innovation sociale dans le domaine de la philanthropie en favorisant ainsi de nouvelles approches et solutions adaptées aux besoins de la communauté. (Étudiant-e 1)

De manière générale, pour certain-e-s répondant-e-s, la recherche de nature scientifique représente un maillon faible du secteur philanthropique. PhiLab a permis des avancées en ce sens. Il y a donc eu renforcement de l'écosystème en le dotant de ressources supplémentaires. Sur ce point, PhiLab a également su mettre en place une plateforme web accessible et facile d'utilisation pour diffuser les travaux de recherche et autres contenus donnant une tangibilité aux contributions du PhiLab par rapport au

développement des connaissances et des réflexions sur la philanthropie.

Il est salué la diversité dans les formes de diffusion des connaissances valorisées par PhiLab : les cahiers de recherche, les articles, les balados, la revue annuelle, les études de cas, les entrevues... Les conférences et webinaires sont particulièrement appréciés. Ils offrent des espaces de partage des connaissances, de réflexion et sont de bonnes occasions de réseautage. L'infolettre est aussi importante, elle permet de suivre les avancées des différents projets et d'explorer des thématiques plus en profondeur. La plateforme web assure aussi un travail d'archivage des connaissances.

Ce qui gardera le projet allumé longtemps, c'est l'audience à laquelle seront diffusées les recherches par les fondations. En termes d'impact de la recherche philanthropique, ne pas collaborer davantage avec les bénéficiaires serait une erreur. (Partenaire 2)

Il a aussi été mentionné un intérêt croissant marqué, de part et d'autre, pour le développement de projets novateurs de recherche. Par intérêt croissant, il est indiqué que les premières propositions de recherche se faisaient autour de projets qui n'étaient pas encore complètement mûrs lorsqu'ils furent lancés. Cette situation s'est améliorée et les projets, en fin de trajectoire (les deux dernières années), sont beaucoup plus solides et ont un degré de généralisation plus élevé.

Pour les phases subséquentes, il est proposé d'effectuer des recherches d'un ordre de grandeur plus élevé, permettant de développer l'ossature des données sur le milieu philanthropique canadien. Il est suggéré de se pencher sur des questions relatives au rôle des fondations dans l'écosystème sociétal. De le faire de façon que différentes parties prenantes puissent participer à la collecte des données, à la production des analyses et d'être plus engagées dans la valorisation des connaissances.

Les types de recherche

La majorité des répondant-e-s sont d'avis que la recherche fondamentale ainsi que la recherche appliquée, doublée d'une capacité d'accompagnement, sont à conserver pour les prochaines phases du PhiLab.

D'une part, il est rappelé que la recherche fondamentale nourrit la recherche appliquée. Ce

constat témoigne de la présence, chez certaines organisations partenaires, d'une appropriation de la méthode scientifique de recherche. De plus, il est rappelé que la recherche fondamentale est importante dans les processus de formation d'une relève. Elle aide aussi les fondations à mieux comprendre le rôle et l'influence de la conjoncture, l'impact de certaines politiques publiques où le manque de législation, ce qui les outille pour mieux les naviguer. PhiLab demeure l'un des seuls lieux à combiner ces deux modes de recherche, et, pour plusieurs répondant·e·s, il serait dommage de perdre cette qualité.

D'une autre part, la recherche appliquée assure une implication directe de partenaires dans le processus de recherche, ce qui s'avère très formatif. Il est senti que cette façon de faire a des retombées positives en matière de développement des capacités organisationnelles. Le modèle du partage et du croisement des savoirs, des échanges multi-acteurs est riche.

Dans l'accompagnement il y a du transfert, mais qui se met au service de l'action. Pour la recherche fondamentale, celui qui reçoit est libre de faire ce qu'il veut avec les résultats, mais la recherche et accompagnement se fait de manière plus organique. (Partenaire 4)

Il est également rappelé que pour des phases à venir du PhiLab, les intérêts et préoccupations des partenaires, sur le plan du développement de nouveaux savoirs et d'intégration de ces derniers dans la pratique, devraient demeurer au cœur de la démarche. Il faut que la recherche soit utile, qu'il y ait intérêt à s'approprier de façon active les résultats.

Prise en compte de la recherche dans les organisations

Les réponses des répondant·e·s traduisent une prise en compte variable des résultats de recherche dans les organisations partenaires. Bien que l'utilisation de données soit de plus en plus courante dans les organisations philanthropiques, l'intérêt pour la recherche de type universitaire est encore fragile.

Les recherches qui ont le plus de valeur aux yeux de plusieurs partenaires sont celles qui aident à réduire, à titre indicatif, la friction qu'il peut y avoir dans les modalités relationnelles : par exemple entre les organisations donatrices et les bénéficiaires. Il en est ainsi des recherches qui permettent de mieux cerner

le rôle et la place de la philanthropie par rapport à des causes sociales et à d'autres acteurs sociaux sont aussi appréciées.



(...) la recherche fondamentale est importante dans les processus de formation d'une relève. Elle aide aussi les fondations à mieux comprendre le rôle et l'influence de la conjoncture, l'impact de certaines politiques publiques où le manque de législation, ce qui les outille pour mieux les naviguer. PhiLab demeure l'un des seuls lieux à combiner ces deux modes de recherche, et, pour plusieurs répondant·e·s, il serait dommage de perdre cette qualité.



Les études en lien avec l'enjeu face à la substitution gouvernementale ont vraiment modifié notre approche stratégique face aux demandes. Comment soutenir une population qui dépend beaucoup des programmes gouvernementaux sans être dans la substitution gouvernementale? L'enjeu c'est de ne pas mettre le financement

gouvernemental en péril, mais d'aider le mieux possible en étant complémentaire. (Partenaire 8)

Il est aussi fait mention que les travaux du PhiLab ouvrent la voie à l'utilisation d'autres sources de données et à leur utilisation pour générer de nouvelles stratégies d'action. Se servir de diverses sources documentaires, de données provenant d'autres organisations, d'autres réseaux et du secteur communautaire nourrit de façon élargie la réflexivité dans le secteur. Cela facilite une mise à jour et un questionnement sur les angles morts des pratiques en place.

Percolation et diffusion des connaissances

Bien que PhiLab ait fait des efforts notables quant à la diversification de ses mécanismes de diffusion, ils ne semblent pas suffisants pour assurer une percolation systématique des connaissances de même qu'une diffusion sur le terrain et à plus grande échelle. Certaines personnes sont critiques par rapport aux produits de recherche qui leur paraissent souvent trop académiques. Un travail supplémentaire de vulgarisation permettrait de générer davantage d'intérêt auprès des partenaires.

D'autres répondant·e·s critiquent le manque de planification dans le transfert des connaissances au moment de la conception du design de recherche, ce qui a un impact sur la capacité des organisations à s'approprier les résultats.

Si le secteur philanthropique ne s'empare pas de l'outil, il est difficile pour l'outil de répondre aux besoins. La recherche basée sur le cas d'organisations précises, taillée sur leurs besoins et questionnements semble être l'approche la plus bénéfique. (Chercheur·e 1)

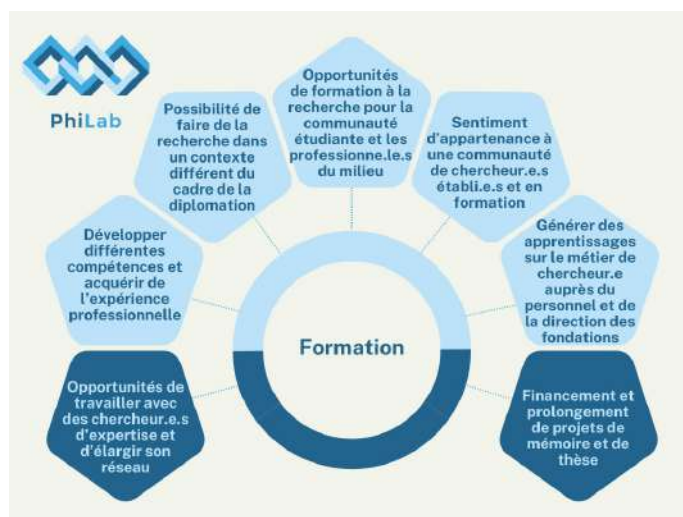
Il y aurait alors place à un effort supplémentaire afin de mieux penser le travail en amont de valorisation spécifique et généralisée des résultats. Le défi est de communiquer non seulement les résultats de la recherche, mais aussi d'assurer une accessibilité élargie et des modalités d'accompagnement pour une percolation efficace.

Il y a également un désir à faire ruisseler la recherche au niveau local, dans les organismes et auprès du grand public. Plusieurs seraient favorables à penser des moyens de diffusion qui généreraient de l'intérêt

non seulement pour les données brutes, mais aussi pour les analyses et les pistes d'action. Par exemple, en ayant une équipe de vulgarisation pouvant rédiger des communiqués de presse et les transmettre à plusieurs journalistes ou encore en renforçant les liens avec des organisations intermédiaires de diffusion, tels les médias philanthropiques, afin de rejoindre les gens du secteur, les organismes et le grand public. Il faudrait toutefois que le contenu soit organisé en fonction de ce dont les publics visés ont besoin.

J'aimerais qu'on réussisse à faire parler de la philanthropie dans les médias de manière positive. Ce serait bien qu'à travers des résultats de recherche qui documentent ce que l'on arrive à faire on parle enfin en bien de la philanthropie, pas seulement les critiques. (Partenaire 8)

En travaillant de façon plus poussée les modalités de transfert, PhiLab aurait le potentiel de devenir une ressource incontournable pour les médias, ce qui renforcerait sa fonction de communication, de transfert et de diffusion.



4. Formation

Finalement, le PhiLab, même si sa mission est centrée sur le développement des savoirs, doit inévitablement jouer un rôle dans la formation de chercheur·e·s. Ce réseau a su offrir de nombreuses opportunités de formation à la recherche, spécifiquement à la communauté étudiante, mais aussi à des professionnel·le·s du milieu. Sur ce dernier point, PhiLab a indirectement généré des apprentissages sur le métier de chercheur·e et favorisé l'infiltration du « virus » de la recherche auprès du personnel et de la direction de fondations.

Pour certain·e·s étudiant·e·s, s'impliquer à PhiLab en prolongement de leur projet de maîtrise ou de doctorat. D'autres ont beaucoup apprécié la possibilité de faire de la recherche dans un contexte différent de leur cadre de diplomation, leur permettant de développer différentes compétences et d'acquérir de l'expérience professionnelle.

Dans l'ensemble, l'opportunité de collaborer avec des chercheur·e·s d'expérience et d'élargir son réseau personnel est considéré comme une valeur ajoutée issue de l'implication et la collaboration d'étudiant·e·s au Réseau. Il s'en est dégagé le sentiment d'appartenir à une communauté de chercheur·e·s établi·e·s et en formation.

Le financement appuyé par le PhiLab a permis plusieurs projets d'étudiant·e·s doctorants avec des partenaires. C'est une formule gagnant-gagnant entre les étudiant·e·s qui ont complété leur thèse et les partenaires qui en retirent également quelque chose. (Chercheur·e 5)

Il est rappelé que le bassin de chercheur·e·s et d'étudiant·e·s qui travaillent sur des thématiques en lien avec la philanthropie est très limité, bien qu'en légère progression. Le PhiLab a quand même réussi, est-il apprécié, à mobiliser un nombre relativement important de chercheur·e·s..

Conclusion

En fin de cette deuxième de trois phases évaluatives du travail réalisé par PhiLab, il nous est possible de dégager les principaux apports et contributions identifiés par les répondant·e·s. Selon leurs propos, PhiLab :

- Offre un espace réflexif où peuvent se croiser les savoirs propres au milieu académique et ceux du secteur philanthropique.
- Génère des recommandations utiles fondées sur la recherche.
- A mis des mots sur des pratiques, des intuitions et des visions et a permis de mieux qualifier les questionnements, les défis, les enjeux, les limites et les opportunités du secteur philanthropique.
- A développé un sentiment d'appartenance au Réseau.
- A généré de la connectivité au niveau pancanadien entre des parties prenantes de l'écosystème et les alliés de la philanthropie.
- A approfondi, d'un point de vue multidisciplinaire,

les connaissances sur la philanthropie en développant l'esprit critique et la réflexivité.

- A offert une palette de modalités de diffusion autour d'une plateforme web accessible.
- A essayé d'intégrer les résultats des recherches dans les processus de réflexion en appui à la conception des stratégies déployées par des fondations.
- A soutenu la formation de chercheur·e·s et a offert des opportunités de recherche et de publication.



Dans l'ensemble, l'opportunité de collaborer avec des chercheur·e·s d'expérience et d'élargir son réseau personnel est considéré comme une valeur ajoutée issue de l'implication et la collaboration d'étudiant·e·s au Réseau. Il s'en est dégagé le sentiment d'appartenir à une communauté de chercheur·e·s établi·e·s et en formation.



Rappelons également les limites et obstacles qui ont été mentionnés.

- Un pouvoir d'influence relativement faible de PhiLab par rapport aux changements systémiques à voir advenir.
- Un engagement inégal de partenaires et de chercheur·e·s.
- Une faible collaboration entre les centres régionaux.

- Une variabilité dans la prise en compte de la recherche dans les fondations partenaires.
- Un manque de communication par rapport aux opportunités de recherche et de publication.
- Une variabilité dans la percolation des connaissances dans le secteur et à plus grande échelle.
- Des réalités multiples et des temporalités variables.
- Une grande rotation des ressources humaines dans le secteur, particulièrement au niveau des directions des organisations et des têtes porteuses du projet initial.
- Des travaux parfois considérés trop académiques.
- Une attractivité et une capacité de rétention à renforcer des chercheur·e·s et étudiant·e·s au sein du Réseau.

Dans le cadre d'une poursuite des activités du PhiLab, les recommandations suivantes ont été formulées.

- Reconduire le travail de liaison dans le secteur qui avait été fait en 2017 pour l'obtention du financement CRSH 2.0.
- Offrir plus d'activités de réseautage dans des contextes sympathiques.
- Mettre en place des projets transversaux favorisant la collaboration entre les centres régionaux.
- Répondre aux besoins et aux spécificités locales et régionales sans le faire aux dépens du réseau national.
- Développer un outil de communication centré sur les avancées des projets en cours et des opportunités à venir.
- Travailler davantage avec et auprès des bénéficiaires dans la validation des résultats de recherche.
- Conserver la recherche fondamentale ainsi que la recherche appliquée dans le processus de production de connaissances.
- Mettre en place une équipe chargée de la vulgarisation afin de diversifier les méthodes de diffusion des résultats de recherche.

Au terme des phases 1 et 2 d'évaluation, nous constatons la grande pertinence du Réseau et une cohérence à parfaire du projet proposé par PhiLab.

Bien que des défis importants sont en vue pour les prochaines moutures, plus particulièrement en lien avec le financement et le remplacement des leaders universitaires du projet, il se dégage un consensus fort selon lequel PhiLab occupe une place incontournable dans l'écosystème philanthropique canadien.





ENTREVUE | INTERVIEW

Evaluation of the PhiLab project Assigned roles and functions

By Laurence Croteau, Master's graduate in Environmental Sciences at the UQAM et student member of the CRISES, the ISE and PhiLab



Laurence Croteau is a Master's graduate in Environmental Sciences at the Université du Québec à Montréal (UQAM). She is a student member of the Centre de recherche sur les innovations sociales (CRISES), the Institut des sciences de l'environnement (ISE) and PhiLab. Her work focuses on social innovation and local citizen initiatives to improve waste management on touristic islands. She is particularly interested in eco-citizenship, the development of collective capacities and citizen involvement in eco-social transformations.

As the end of SSHRC funding approached, the PhiLab Steering Committee commissioned the production of an evaluation presenting the views of PhiLab Network members on the participatory research work carried out over the past six years (2018-2024).

The aim was to draw up an assessment and survey the various participants in the Network (students, researchers and partners) in order to identify the strengths and limitations of this experience.

Based on a ten-question survey, this exercise produced a light and impressionistic assessment of the work carried out. This first phase was followed by a qualitative survey based on interviews with Network members. The results of this process were used to structure an analysis of PhiLab's roles and functions, to assess the work carried out and to identify avenues for future work and restructuring.

Between the first and second phases, the Mirella and Lino Saputo Foundation suggested that we complete the evaluative work mandated by the Steering Committee by addressing the issue of the concrete spin-offs or impact of our activities on the Network's member organizations. We accepted this proposal, which has given rise to a third, more exhaustive phase, the results of which will be presented in another report to be published in the spring of 2025.

Here are the results of the second phase of our work.

Key elements of the project

PhiLab's general objectives, as formulated in the funding application submitted to SSHRC under the title - *Evaluation of the role and actions of Canadian*

grantmaking foundations in response to social inequalities and environmental challenges - were as follows.

- Produce and disseminate new content on Canadian philanthropy and associated themes (national and international solidarity, volunteering, community engagement, social innovations, etc.)
- Offer a space for the conduction and coordination of research
- Foster the emergence of new directions for theoretical and applied research
- Being a reference for sector actors in the sharing and dissemination of knowledge, practices and innovations in philanthropy
- Organize scientific and knowledge transfer activities
- Train new researchers.

To these objectives were added four elements forming the core of the program and work approach.

1. Enhance knowledge of the Canadian and Quebec philanthropic landscape.
2. Document and illustrate the contribution of grant-making foundations in :
 - a. social justice; and
 - b. environmental justice.
3. Pay particular attention to initiatives developed by medium-sized foundations.
4. Develop an innovative approach to knowledge transfer.

The PhiLab Network work program was deployed from:

- four regional work centers located in each of Canada's major regions;
- a sector center dedicated to partnership research on aboriginal issues and challenges;
- a partnership research unit on African philanthropy; and
- collaborative nodes involving researchers in the USA, Brazil, Chile, Australia, Spain and France.

The evaluation process

The evaluation process was carried out in two phases.

As a first step, an online survey was sent out in autumn 2023, to all Network members (Appendix 1). We received 31 responses. From the survey information, an infographic was produced that summarized the highlights emerging from the survey (Appendix 2).

In a second phase, at the beginning of winter 2023-2024, interviews with 16 people representing the

three key populations of our Network, namely: established researchers, researchers-in-training and partners involved in our various activities and working methods. Through their testimonies, these people shared their representations of the roles and functions attributed to PhiLab.

The information derived from the interviews has been grouped around four aspects.

1. Sector development.
2. PhiLab as a proximity laboratory between universities and players in the Canadian philanthropic ecosystem.
3. Production and dissemination of knowledge about philanthropy.
4. Training researchers.

For each of these aspects, we have identified highlights in terms of contributions (main and potential), limitations and challenges. Finally, we have identified possible courses of action and a set of recommendations.



1. Sector development support

PhiLab's research and knowledge enhancement activities have put words to practices, intuitions and visions, and have helped identify questions and challenges specific to the philanthropic sector. The production of new knowledge, or the valorization of existing knowledge, has had the effect of stimulating debate on foundation practices, and instilling greater reflexivity on these practices.

Foundations had a reflex to do things by instinct. PhiLab came at an important time, when foundations were beginning to question their

approach, their investment practices and their place in relation to the State. PhiLab helped to advance thinking in a broader sense on certain issues that concern them. (Partner 4)

In a context where knowledge about philanthropy remains limited, there is a need to respond to this lack by generating knowledge to enable different audiences to gain a better understanding of the philanthropic sector and the issues that run through it. Some partners adopted a mutualist stance, knowing that not all the work would necessarily meet their specific needs, but that it would benefit the philanthropic community at large.

For partners with a need to establish a critical reflective space, PhiLab is said to have been able to meet this expectation. Finally, whether global or specific, in terms of practical knowledge or critical reflection, the activities generated by PhiLab have helped the sector to get to know itself better and to be better understood.

Now, with regard to PhiLab's potential to induce systemic change through the production and dissemination of knowledge, or to bring about positive changes in public policy, the following points of view are emerging.

Firstly, being a catalyst for systemic change is not a role that PhiLab has been assigned from the outset. Systemic change often results from the convergence of several elements. Attributing credit to a single entity and distinguishing the trigger is difficult.

The Network has helped to energize the philanthropic community, making people and government more knowledgeable about the sector, but we're not necessarily talking about systemic change at this stage. It's more of a mirror effect on the discussions going on in the sector, without PhiLab being the trigger. (Partner 7)

So, while many factors contribute to systemic change, PhiLab would have played a modest role in this. Its work on power relations, on trust-based philanthropy and on the sector's relationship with the state were important and are repeatedly mentioned as highlights of the Network's work. Respondents' views also converge on the fact that PhiLab has played a significant role in the development of conversations, and that it is a tool that can be put to greater use.

Secondly, with regard to its influence on public policy,

PhiLab's work can help to better define and support the philanthropic sector with the government. However, its overall work has had very little influence. For its influence to grow, the Network should become more clearly involved in advocacy activities: such as taking part in public consultations, writing opinion pieces and raising media awareness on certain key issues. PhiLab's influence should also help raise the profile of philanthropic issues among the general public.

In this sense, it was suggested that research initiatives carried out with social partners and focusing on political themes could serve as a basis for advocacy of social partners' interests and thus contribute to the development or improvement of public policies.

In addition, the potential for influence is seen more in the internal practices of philanthropic foundations (i.e., at the foundation's organizational and institutional level). PhiLab's research-based recommendations encourage these organizations to review or adjust their funding strategies, collaborative approaches and philanthropic programs.



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2. A local laboratory in a pan-Canadian network

PhiLab is a laboratory space requiring proximity between the parties involved in the projects studied or the themes addressed. This laboratory space fosters productive encounters between academia and the philanthropic sector, provided a relationship of trust has been well established, or at least the potential to do so exists. It was pointed out that working in a network facilitates collaboration between the various project stakeholders, allowing for more in-depth reflection.

The research approach, based on a proximal relationship, is important. This posture ensures that many projects are aligned with the needs of the community. It's a laboratory approach, where research focuses on situations or experiments from which questions are drawn jointly by foundations and the research community.

It was mentioned that the richness of partnership research lies in the alignment of the concerns of one and the interests of the other. The relationship between researchers and partners is not limited to participation in specific research projects. It is clear that several partners have benefited from the availability of researchers who can share their expertise and provide reflective feedback on their organization's activities. These moments of complicity, sometimes informal, nurture a space for informal transfer and critical analysis. They bring research processes and dynamics to life.

There's something very gratifying about the support we can offer our partners through our research and our encounters with them.
(Researcher 5)

Networking activities are vital to consolidating a sense of belonging to something common: the philanthropic ecosystem. These get-togethers provide a casual way of forging relationships, and are generally greatly appreciated. There's no denying that PhiLab is part of the philanthropic ecosystem.

The important work done with foundations to obtain SSHRC funding is to be commended. It is suggested that this process of mobilizing interest in the PhiLab approach be renewed for future phases. PhiLab could develop relationships with new partners, but also improve relationships with partners who have drifted apart. This distancing is often linked to the high turnover rate among management staff.



The research approach, based on a proximal relationship, is important. This posture ensures that many projects are aligned with the needs of the community. It's a laboratory approach, where research focuses on situations or experiments from which questions are drawn jointly by foundations and the research community.



The added value of the National Network

The value and relevance of working on a national scale is recognized by all respondents. The project was essentially developed through a desire to act on a pan-Canadian scale, without neglecting the importance

of regional and local roots. The network provides connectivity between philanthropic allies and enables learning and sharing of initiatives between regions.

The key is to talk to each other on a pan-Canadian level. Rules, policies and issues are global. That's what's so great about the national network: we're asking ourselves the same questions across the country, and we can make progress on a global scale rather than going it alone. (Partner 9)

It was also mentioned that regions outside major urban centers benefit greatly from access to a national network, as they have fewer local relationships with organizations often located in metropolitan areas. In fact, the Network has been the first point of contact between eccentric regional organizations and major regional and national players.

It's also important to note that there are specificities and characteristics specific to the provinces, major centers and remote regions. It seems crucial to consider these distinctions in the way we do philanthropy, but also in our curiosity about change, which may be more present in some places than others.

Collaboration between regional centers: strengths and weaknesses

Many have criticized the lack of collaboration between regional centers. There are many reasons for this. On the one hand, cross-functional projects with strong potential for collaboration between regional centers have been rare. On the other hand, by setting up regional centers, this approach did not encourage the development of an overall vision based on the themes addressed in the research activities. The result has been the development of research in silos.

Faced with this situation, it is recommended that the expertise and research concerns of researchers from different regional centers be mobilized around cross-cutting subjects, thus fostering a collaborative dynamic. It is felt that the network would benefit from stronger networking between researchers by encouraging their association around various research and knowledge transfer projects or activities.

On the researcher side, it was mentioned that collaboration between regional centers had been weak, but that relationships had developed well between researchers in the same regional center. However, although relations were not necessarily very close, the operational meetings acted as a community

of practice and consolidated the feeling of being part of a whole.

Despite this positive effect, there was a lack of communication about opportunities for collaboration in research and knowledge transfer, which sometimes led to a feeling of "missed opportunities". Learning after the fact that projects had taken place, and therefore that opportunities for collaboration had passed, sometimes gave the impression of a competitive rather than a collaborative dynamic.

To alleviate this irritating factor, it is recommended to develop a frequently updated coordinated communication tool on the progress of current projects and upcoming opportunities. A clear presentation of research and commercialization opportunities would also satisfy the desire of students to become more involved in the Network.

The team's rigorous and consistent approach to coordination has been widely praised. However, centralized coordination does not seem to be a formula that encourages collaboration between regional centers. Because communications are centralized, the regional centers felt they were dependent on and waiting for instructions. This reinforced the idea to work autonomously.

A governance structure is proposed in which the coordinator would gather information without delegating tasks, thus improving collaboration between regional centers. According to this recommendation, coordination would be more of a concentration and dissemination function, with the duty of gathering information and passing it on.

Multiple realities

It is mentioned that the reality or situation of the network's stakeholders is different. This is certainly due to the fact that the philanthropic milieu is heterogeneous. As a result, collaborations in the various research partnerships are not uniform, and levels of commitment are not the same.

It should be remembered that the time scales of academic research do not necessarily correspond to those of the partners. This situation sometimes has the effect of operating at two speeds: fast for the partners and slow for the research.

It is important to agree at the start of the process on the temporality and conditions of scientific research. For the researchers, they recall the importance of identifying clear research questions, problematizing

and contextualizing them. The final product will reflect these elements, while highlighting the main findings of the research activity, which are not necessarily considered useful by the partners in the form presented: copious reports making them difficult to access and use.

Research does not mean consulting. Organizations have a reflex to turn to consultants. Researchers answer questions, but are not there to advise on actions. It's up to the organization to make decisions. (Researcher 2)

The partners tell us how important it is to have syntheses, to be able to rely on clear indications of impacts or effects, and to know how to translate research into concrete tools.

For the next phases of PhiLab, we suggest experimenting with and systematizing a collaborative method that can bridge the gap between the two expectations: the research process, on the one hand, in terms of scientific rigor, and, on the other, the pragmatic need to enable effective and appropriate appropriation of its results by the partners.



3. Producing and disseminating knowledge about philanthropy

Among the roles assigned to PhiLab, a fundamental one is to produce and disseminate new knowledge while being innovative in the ways it is done. It's clear that activities have reported on the evolution of various trends within the philanthropic milieu, while relaying different critical viewpoints on them.

We appreciated the fact that we were working on subjects that had not yet been studied. New knowledge is then relevant to philanthropic

professionals, and in some cases can have an impact on partner organizations.

By encouraging research and the sharing of innovative ideas, the network stimulates social innovation in philanthropy, fostering new approaches and solutions adapted to community needs. (Student 1)

Generally speaking, for some respondents, scientific research is a weak link in the philanthropic sector. PhiLab has enabled progress to be made in this area. It has strengthened the ecosystem by providing it with additional resources. In this respect, PhiLab has also succeeded in setting up an accessible, easy-to-use web platform for disseminating research work and other content, giving tangibility to its contributions to the development of knowledge and thinking on philanthropy.

The diversity of ways in which PhiLab disseminates knowledge is commended: research notebooks, articles, podcasts, the annual review, case studies, interviews... Conferences and webinars are particularly popular. They provide a forum for knowledge-sharing, reflection and networking. The newsletter is also important, enabling us to follow the progress of various projects and explore themes in greater depth. The web platform also serves as a knowledge archive.

What will keep the project afloat for a long time is the audience to which the research is disseminated by the foundations. In terms of the impact of philanthropic research, not collaborating more with beneficiaries would be a mistake. (Partner 2)

There was also growing interest on both sides in the development of innovative research projects. By growing interest, we mean that the first research proposals were based on projects that were not yet fully mature when they were launched. This situation has improved, and the projects at the end of the trajectory (the last two years) are much more solid and have a higher degree of generalizability.

For subsequent phases, it is suggested that research of a higher order of magnitude be carried out to develop the backbone of data on the Canadian philanthropic milieu. It is recommended that questions relating to the role of foundations in the societal ecosystem be addressed. It must be done in a way that allows different stakeholders to participate in data collection and analysis production, and be more involved in the valorization of knowledge.



(...) general research is important in the process of training the next generation of researchers. It also helps foundations to better understand the role and influence of the economic climate, the impact of certain public policies or the lack of legislation, thus equipping them to better navigate these issues. PhiLab remains one of the few places to combine these two modes of research, and for many respondents, it would be a shame to lose this quality.



Search types

The majority of respondents were of the opinion that general research, as well as applied research, coupled with support capacity, should be retained for the next phases of PhiLab.

On the one hand, general research feeds applied research. This observation reflects the fact that certain partner organizations have adopted the scientific research method. In addition, general research is important in the process of training the next generation of researchers. It also helps foundations

to better understand the role and influence of the economic climate, the impact of certain public policies or the lack of legislation, thus equipping them to better navigate these issues. PhiLab remains one of the few places to combine these two modes of research, and for many respondents, it would be a shame to lose this quality.

On the other hand, applied research ensures the direct involvement of partners in the research process, which proves highly formative. It is felt that this approach has a positive impact on the development of organizational capabilities. The model of knowledge sharing and cross-fertilization, of multi-actor exchanges, is a rich one.

In coaching, there's transfer, but it's at the service of action. In general research, the recipient is free to do what they like with the results, but research and support are more organic (Partner 4).

For future phases of PhiLab, the partners' interests and concerns, in terms of developing new knowledge and integrating it into practice, should remain at the heart of the approach. Research must be useful, and there must be an interest in actively appropriating the results.

Taking research into account in organizations

Respondents' answers reflect the varying extent to which research results are taken into account by partner organizations. Although the use of data is increasingly common in philanthropic organizations, interest in university-style research is still fragile.

The research that is most valuable in the eyes of many partners is the kind that helps to reduce the friction that may exist in relational modalities: for example, between donor organizations and beneficiaries. Research that helps to better define the role and place of philanthropy in relation to social causes and other social actors is also appreciated.

Studies on the issue of government substitution have really changed our strategic approach to requests. How can we support a population that is heavily dependent on government programs, without becoming involved in government substitution? The challenge is not to jeopardize government funding, but to help in the best possible way by being complementary. (Partner 8)

It is also mentioned that PhiLab's work paves the way

for the use of other data sources, as well as their use to generate new strategies for action. Drawing on a variety of documentary sources and data from other organizations, networks and the community sector broadens reflexivity in the sector. This facilitates updating and questioning the blind spots in existing practices.

Percolation and dissemination of knowledge

Although PhiLab has made significant efforts to diversify its dissemination mechanisms, these do not appear to be sufficient to ensure systematic percolation of knowledge and wider dissemination in the field. Some people are critical of research products, which often seem too academic. Further popularization work would help generate greater interest among partners.

Other respondents criticize the lack of planning for knowledge transfer at the research design level, which has an impact on the ability of organizations to take ownership of the results.

If the philanthropic sector doesn't take hold of the tool, it will be difficult for the tool to respond to needs. Research based on the case of specific organizations, tailored to their needs and questions, seems to be the most beneficial approach (Researcher 1).

There would then be room for an additional effort to better consider the upstream work of specific and generalized valorization of results. The challenge is not only to communicate research results, but also to ensure that they are widely accessible, and to provide the support needed for effective dissemination.

There is also a desire for research to trickle down to the local level, within organizations and to the general public. Many would be in favor of devising means of dissemination that would generate interest not only in the raw data, but also in the analyses and courses of action. For example, by having an outreach team that could write press releases and forward them to several journalists, or by strengthening links with intermediary dissemination organizations, such as the philanthropic media in order to reach people in the sector, organizations and the general public. However, content should be organized according to the needs of the target audience.

I'd like to see philanthropy discussed positively in the media. It would be nice if, through research

results documenting what we manage to do, we could finally talk positively about philanthropy, not just critics. (Partner 8)

By working more closely on transfer methods, PhiLab has the potential to become a key resource for the media, strengthening its communication, transfer and dissemination function.



4. Training

Finally, although PhiLab's mission is focused on the development of knowledge, it must also play a role in the training of researchers. The network has provided numerous opportunities for research training, specifically for the student community, but also for professionals in the field. On the latter point, PhiLab has indirectly generated learning about the profession of researcher and encouraged the interest of research among foundation staff and management.

For some students, involvement in PhiLab was an extension of their master's or doctoral project. Others have greatly appreciated the opportunity to carry out research in a context different from their graduation framework, enabling them to develop different skills and gain professional experience.

Overall, the opportunity to collaborate with experienced researchers and expand one's personal network is seen as an added value resulting from the involvement and collaboration of students in the Network. What emerges is a sense of belonging to a community of established and emerging researchers.

PhiLab-supported funding has enabled several PhD student projects to create relationship with partners. It's a win-win situation for the students who have completed their thesis and the partners

who also get something out of it (Researcher 5).

It was pointed out that the pool of researchers and students working on philanthropy-related themes is very limited, although growing slightly. PhiLab has nevertheless succeeded in mobilizing a relatively large number of researchers.

Conclusion

At the end of this second of three evaluation phases of PhiLab's work, we can identify the main contributions made by the respondents. According to them, PhiLab:

- Provides a reflective space where academic and philanthropic knowledge can come together.
- Generates useful research-based recommendations.
- Has put words to practices, intuitions and visions, and enabled us to better qualify the questions, challenges, issues, limits and opportunities of the philanthropic sector.
- Developed a sense of belonging to the Network.
- Generated pan-Canadian connectivity between ecosystem stakeholders and philanthropic allies.
- Deepened knowledge of philanthropy from a multidisciplinary perspective, developing critical thinking and reflexivity.
- Offered a range of distribution methods based on an accessible web platform.
- Attempted to integrate research findings into thinking processes in support of the design of strategies deployed by foundations.
- Supported the training of researchers and provided research and publication opportunities.

We would also like to remind you of the limitations and obstacles mentioned above.

- PhiLab's relatively limited power to influence systemic change.
- Uneven commitment from partners and researchers.
- Weak collaboration between regional centers.
- Variability in the way research is taken into account by partner foundations.
- Lack of communication about research and publication opportunities.
- Variability in the percolation of knowledge within the sector and on a wider scale.
- Multiple realities and varying timeframes.
- A high turnover of human resources in the sector, particularly at management level and among the heads of the initial project.
- Work sometimes considered too academic.

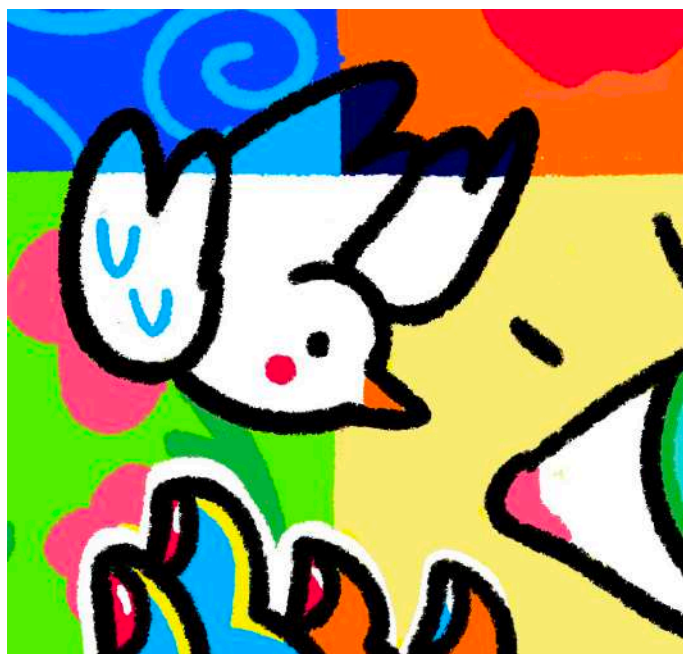
- Attractiveness and retention of researchers and students within the Network.

With a view to continuing PhiLab's activities, the following recommendations have been made:

- Continue the liaison work in the sector that was done in 2017 to obtain SSHRC 2.0 funding.
- Offer more networking activities in friendly settings.
- Set up cross-functional projects to encourage collaboration between regional centers.
- Respond to local and regional needs and specificities, without doing so at the expense of the national network.
- Develop a communication tool focusing on the progress of current projects and future opportunities.
- Work more closely with beneficiaries in validating research results.
- Maintain general research as well as applied research in the knowledge production process.
- Set up an extension team to diversify methods of disseminating research results.

At the end of phases 1 and 2 of the evaluation, we note the great relevance of the Network and the need to perfect the coherence of the project proposed by PhiLab.

Although major challenges lie ahead for the next phases, particularly in terms of funding and replacing the project's academic leaders, there is a strong consensus that PhiLab occupies an essential place in the Canadian philanthropic ecosystem.



DOSSIER SPÉCIAL | SPECIAL FEATURE





DOSSIER SPÉCIAL | SPECIAL FEATURE

Six Years of Partnership Research on Grantmaking Philanthropy: What have we learned?

By PhiLab's Operational committee

Introduction

After an initial three-year SSHRC Partnership Development project, the current PhiLab research phase was launched in 2018, with the objective of evaluating the role and actions of Canadian grantmaking foundations in response to social inequalities and environmental challenges.

From the beginning, the Network has been a space for *partnership-oriented research, as well as knowledge sharing and mobilization* on philanthropy and more specifically, Canadian grantmaking foundations.

The Network is divided into four regional hubs (Western, Ontario, Quebec, Atlantic) as well as a two dedicated Hubs related to Indigenous and African lead research Hubs and select international researchers. The Network ties together researchers, students, and

members of the philanthropic community to create new knowledge and share information, resources, and ideas.

The Network adopts a partnership-oriented research position and conducts both field and theoretical research on themes, questions and issues related to the history and development of philanthropy in Canada, as well as its role in addressing social inequalities, the environmental transition, and with comparisons made with foreign philanthropy.

PhiLab Network Objectives

- Produce and disseminate new content on Canadian philanthropy and associated themes (e.g., national and international solidarity, volunteering, community engagement, social innovations, invisible causes, diversity, equity and

inclusion, grantmaking practices).

- Offer a space to conduct and coordinate research.
- Foster the emergence of new directions for theoretical and applied research.
- Being a reference for sector actors in the sharing and dissemination of knowledge, practices, and innovations in philanthropy.
- Organize scientific and knowledge transfer activities.
- Train new researchers.

In addition to the management of many research projects, PhiLab has supported post-doctoral interns and the education and training of graduate students. PhiLab organizes seminars, podcasts, webinars and symposiums that allow for the sharing and dissemination of new knowledge. The Network also publishes [special edition newsletters](#) and a yearly journal, [The Philanthropic Year](#), showcases the most recent work of its members and guest writers.

PhiLab in numbers

- Research projects funded: 93.
- Members: 95 throughout the project + 8 collaborators.
- Partners: 36.
- Publications (up until January 2024):
 - Blogs & Interviews: 285.
 - Journals: 6.
 - Research papers: 34
 - Podcasts: 36.
 - Edited Books – French/ English – 2 prints and 1 on-line.

PhiLab Regional Review

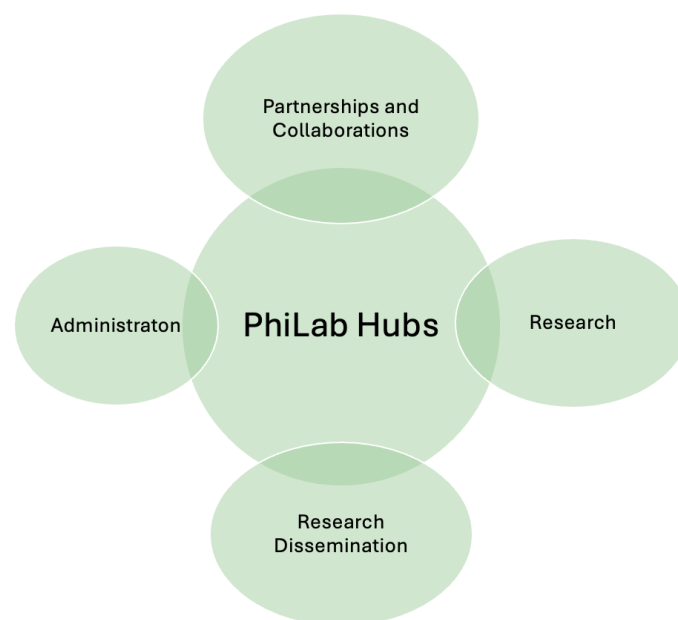
The Philanthropic Year editorial team took time to interview leaders of all four regional hubs to provide them with the opportunity to reflect on their experience with PhiLab. What follows is a profile of four themes that emerged from these conversations. We thank those who participated and all the people, past and present, who have dedicated themselves to supporting philanthropic research in Canada through their development and guidance of the regional hubs.

Supervisors, coordinators and Indigenous and African lead Hub directors

- Diane Alalouf-Hall (PhiLab Québec Supervisor).
- David Grant-Poitras (PhiLab Québec Coordinator).
- Kelly Vodden (Atlantic Hub Supervisor).
- Emily Doyle (Atlantic Hub Coordinator).
- Manuel Litalien and François Brouard (Ontario Hub Co-Supervisors).
- Iryna Khovrenkov and Lynn Gidluck (Western Hub Co-supervisors).
- Shannon Chernick (Western Hub Coordinator).
- Saouré Kouamé (African lead Hub Director).
- Shereen Munshi, (Indigenous Hub).

Themes: Highlights and observations

Four themes emerged from the regional interviews: Partners and Collaborations; Research; Research Dissemination; and Administration.



Partnerships and Collaborations

If there is one singular “take-away” from comments related to partners and collaborations, it’s that PhiLab created an unprecedented opportunity for researchers and philanthropic organizations to connect and collaborate, both with each other, but also amongst themselves.

Since its beginnings in 2014, researchers and philanthropic organizations existed in relatively separate and isolated worlds. Today, researchers and philanthropic organizations across Canada have engaged in sustained, mutually beneficial research relationships. Two of such projects include one between the Quebec Hub and the Mirella and Lino Saputo Foundation and one between the Atlantic Hub and Rural Community Foundations of Nova Scotia, which spanned respectively four and five years and were built around a common research objective. This process of reaching out to identify and explore areas of mutual research interests and working together throughout the process has built a new level of understanding and trust.

“The partnership we have forged with the Mirella and Lino Saputo Foundation is a good example of the gradual creation of a relationship of trust between our two organizations. This partnership, which is part of a broader multi-stakeholder approach, is based on long-term work that began before the COVID-19 pandemic.” - Diane Alalouf-Hall and David Grant-Poitras, Quebec Hub

It became clear that building trust and adequate working relations takes time, and PhiLab was able to build flexibility in goals achievement and development of trust through its research funding and knowledge valorization activities. Transition to a collaborative culture within both the philanthropic and research community was a key element. And even so, some relationships were just starting to bear fruit in the latter phase of the PhiLab project when the SSHRC grant was coming to an end.

While partnerships and collaborations flourished in some quarters, other attempts had challenges. These challenges were related to previous commitments and evolving priorities for different parties; but the impact of COVID and the absence of in-person gatherings cannot be underestimated. It is through personal/professional connections that relationships are built, and COVID, while reinforcing existing relationships, made it difficult to establish new ones.

“Despite the hardships of the health crisis, our partnership with the Mirella and Lino Saputo Foundation has grown stronger, consolidating our shared commitment to research on philanthropy and vulnerable people, especially seniors. The pandemic has confronted us with challenges that have strengthened our relationship of trust and our ability to adapt to our new reality. Today, we see that the common vision we have developed is bearing fruit, arousing the interest of other partners willing to become more involved in the appropriation of the knowledge produced. This collaborative dynamic testifies to the importance of partnership research in creating real and concrete social impact.” - Diane Alalouf-Hall and David Grant-Poitras, Quebec Hub

And

“Covid-19 negatively impacted the ability to hold in-person events. While our virtual events have been well attended and received positive feedback, we have learned that the quality of our connection and engagement with regional partners is much stronger and longer-lasting at in-person events.” - Iryna Khovrenkov and Lynn Gidluck, Western Hub

The Quebec Hub, having been established several years prior to the health crisis, allowed for several in-person events to occur, which could help explain the many strong relationships this regional

hub was able to establish with local partners. However, the Atlantic Hub also highlighted their ability to foster strong relationships with key partners, but in smaller numbers.

“Covid-19 had a positive impact on our ability to connect with various partners without having to travel. We can argue that due to COVID, we were able to reach out further. However, in-person events and contacts are better for building long-lasting relationships. PhiLab enabled us to reduce the usual division between the university, foundations, and community.” - Manuel Litalien and François Brouard, Ontario Hub

Overall, throughout its second phase (2018-2024), PhiLab became a place of convergence for different actors, such as the Indigenous Hub, led by The Circle, to share their visions and ideas with the wider philanthropic community. In this case, The Circle was able to benefit from their partnership with PhiLab to establish their own approach within settler philanthropy and gain visibility within the Network. From an academic perspective, there were opportunities for emerging and established scholars to be better acquainted with each other and the philanthropic community through the different hubs:

“Philanthropic professionals are the conduit through which philanthropy becomes a financial reality in our civil society. Without their work, strategies and actions, philanthropy is, at best, an improvised activity, at worst a concept. In the same way, connecting philanthropy professionals with academics allows for a reflexivity on action that is difficult to achieve when you are in the field.” - Caroline

Bergeron, Quebec Hub

“With support from PhiLab, students and researchers have been able to develop relationships with community groups who are both givers and receivers of philanthropy. By connecting to the National hub and its outputs, the Atlantic was able to think about and react to emerging understandings in comparison to other regions in Canada.” - Kelly Vodden and Emily Doyle, Atlantic Hub

“The PhiLab partnership made a lot of sense in positioning The Circle within the settler philanthropic context and gave us the ability to define things in the way that we spoke of it, and the way that we worked.” - Shereen Munshi, The Circle

“Despite the challenge of distance, the African Hub was able to establish partnerships and collaborations with a number of key players. In particular, we organized a virtual conference in 2022 on African philanthropy, which brought together players from Canada and various African, European countries. This conference was an opportunity to establish collaborations with key players such as Trust Africa, Epic Africa, Wings, the OECD and the African Development Bank.” - Saouré Kouamé, African Hub

At the same time, PhiLab was able to foster the development of new scholars who gravitated toward research collaborations in the philanthropic ecosystem:

“PhiLab Quebec was an important

part of my development as a scholar and continues to be a vital part of the Quebec philanthropic ecosystem. My experience with PhiLab Quebec was one of experimentation, learning, and collaboration. Comprised of fantastic researchers and graduate students and amazing coordinators. - Adam Saifer, Quebec Hub"

"The [research] projects have enabled students and researchers to engage in community-based research and have led to or are potentially leading to outcomes which fulfill the interests of partners (and researchers:). These projects help construct shared understanding of what philanthropy looks like in Atlantic Canada and how these new research and partnerships connect to previous research and understandings of philanthropy in this region." Kelly Vodden and Emily Doyle, Atlantic Hub

In summary, PhiLab's structure fostered a complex web of connections both between the academic and grantmaking worlds, but also among these two communities themselves.

Research

Through the direct funding of research, PhiLab facilitated the exploration of new research themes that had been previously overlooked by the philanthropic sector. Examples include philanthropy and animal rights, support for the elderly, and Indigenous ways of engaging in philanthropy and reciprocity.

So many questions, so few researchers: At the best of times, researchers who choose to dedicate themselves to philanthropic issues are a rare commodity. This, more than anything else, hampers the development of a robust research program. Even those who try to conduct research related to philanthropy compete with teaching and service demands as well as a

"publish or perish" orientation toward tenure and promotion criteria. While publishing in peer-reviewed articles was certainly supported by PhiLab, the focus has, and will continue to be, providing information that is practical and in a format that is accessible for philanthropic organizations and practitioners. In other words, the content was meant to bridge the gap between research and practice.

"We have experienced a difficult time recruiting researchers to become members of the Western Hub. Through brainstorming and reflection, we have concluded that academics could be attracted to this type of partnership grant if research associated with the grant could be published." Iryna Khovrenkov and Lynn Gidluck, Western Hub

"We have experienced a difficult time recruiting researchers and graduate students from Ontario interested in the Hub's work on Philanthropy. We have concluded that academics could be attracted to this type of partnership grant if the research projects associated with the SSHRC grant could be published in a special edition in a leading peer-reviewed scientific journal, or publishing their work at a well-known university press." - Manuel Litalien and François Brouard, Ontario Hub

PhiLab was able to fund 93 research projects across Canada and in some cases, internationally. These funds helped to foster the next generation of academic researchers through research assistant positions, scholarships, awards, and publication opportunities.

Many of the researchers affiliated with PhiLab did so from the perspective that the philanthropic organization or ecosystem was the focal point, thus limiting the pool of researchers working from this angle. Reaching out to researchers in topical areas such

as the environment and social issues and exploring them from a philanthropic perspective could widen the research network. In the future, PhiLab plans to engage researchers from a topical rather than a geographic perspective, providing an opportunity for a wider spectrum of engagement.

Research projects were the building blocks upon which many partnerships could be established with community actors and PhiLab facilitated the process by incorporating a very short and clear project proposal review process and by providing easy-to-access incremental funding over two or three stages. If there was an impediment, it was the capacity to conduct research and the availability of researchers. There was also some difficulty in building connections among researchers, an issue we hope the topical orientation will address.

“What I’m most proud of, are the ways in which our team took risks by exploring questions and themes that have long been ignored by philanthropic practitioners and researchers. In January 2022, for example, we published a [Special Edition on philanthropy and animal rights](#) (a cause close to my heart), which featured contributions ranging from Indigenous perspectives on animal rights and radical environmental activism, to biodiversity and corporate philanthropy.

As philanthropic sector researchers and practitioners attuned to social and environmental justice issues, the pandemic—alongside the murder of George Floyd and the ensuing Black Lives Matter movement—brought to the forefront intersecting forms of marginalization, oppression, and injustice in Canadian society. Within this context, the PhiLab Quebec team supported a diversity of projects led

by our talented researchers, exploring crucial and poignant issues such as the impact of COVID-19 on marginalized communities, the state of philanthropy for vulnerable seniors, food insecurity, trust-based philanthropy, and philanthropic collaboratives, among others.” - Adam Saifer, Quebec Hub

“It is likely that the most promising dissemination strategy we rely on is the act of engaging in and supporting partnered research. By building partnerships into the research process we are able to build a network.” - Kelly Vodden and Emily Doyle, Atlantic Hub

“We initiated a research partnership with WINGS and Trust Africa to document their project aimed at strengthening African philanthropic ecosystems. This research project was a wonderful adventure, involving human encounters and the discovery of a wealth of philanthropic initiatives, as well as the presence of key actors who are transforming the practices of national and international philanthropic organizations on this continent.” - Saouré Kouamé, Anaïs Del-Bono, and Amina Amina Wazoumi Ignanoné, African Hub

Dissemination of Knowledge

COVID did nothing to dampen the desire to disseminate knowledge, in fact, it created a common desire to collaborate to disseminate the results of research projects. As a result, the two most productive years from a dissemination perspective were at the heart of the pandemic in 2020 and 2021, where we published 120 blog articles, conducted 33 interviews, published 3 journals and 18 research papers. We could argue that this period facilitated certain forms

of collaboration with our members and partners, such as publications, over others, such as gatherings and events.

“Out of the health crisis was born a common desire to work more intensively on the dissemination of the results of our research. We explored how to free the research environment from its own academic boundaries so that its results could percolate well in the partner’s network and broader philanthropic ecosystem.” - Diane Alalouf-Hall and David Grant-Poitras, Quebec Hub

The gap between what is interesting/important for the philanthropic community and what was for academia was a challenge when it came to deciding on the means to disseminate research results: blogs vs. research papers vs. academic articles.

“We have concluded that this Partnership Grant has helped decrease the divide between the university and community. However, challenges in effective community engagement remain. This is partly because what is interesting/important for the community when it comes to knowledge translation (i.e., blogs, special editions, etc.) is not recognized in academia as part of the academic performance review.” - Iryna Khovrenkov and Lynn Gidluck, Western Hub

The wide diversity of content may have created confusion and a lack of direction and structure to the dissemination of knowledge. However, the many publication opportunities and platforms allowed for accessibility of different actors (e.g., The Circle, community partners, students, researchers) and transfer of knowledge into a variety of formats (e.g., podcasts, newsletters, book reviews, interviews, blogs, book chapters, Philanthropic Year journal,

Special research editions, videos, etc.). Interviews and podcasts were particularly useful when working with certain actors with limited time to participate. However, on the academic side, published peer-reviewed articles in high impact journals is still the currency of choice.

“When we worked on The PhiLanthropic Year alongside PhiLab, we had somewhere to put a lot of our content so that we can easily share it and disseminate it with our settler philanthropic members and reach them in a way that’s clear given the academic tone. This was very helpful in positioning us and giving us credibility in the eyes of settler philanthropy.” - Shereen Munshi, The Circle

“Communication of original material is important in terms of disseminating research produced. However, recycling research or information already circulating by our civil society partners was not contributing to the [academic] value added of the project. Dissemination of multiple blogs, small articles, newsletters, are not recognized in academia as part of the academic performance review. Academics work success is measured by its “impact factors”, that is key to the promotion to associate or full professor.” - Manuel Litalien and François Brouard, Ontario Hub

Language was one issue that became a challenge: what to translate and when to translate were questions that were influenced by capacity, adaptability, and ability. An investment in an external translation resource, for both written content and live events, was crucial to our success.

“There were challenges in translating

everything, not only at the level of language, but also at the level of cultural context. Simultaneous translation during meetings: yes, it saved time, but it also cuts off communication between members of the [Management] committee. Translation support did create a functional bridge at meetings between French-speaking participants and the rest of Canada in terms of knowledge and research initiatives. This lack of mutual knowledge of sector developments is a divide which serves no one across Canada.” - Katherine Mac Donald and Benoit Martel, National Hub

Our commitment to including the Circle on Philanthropy and Aboriginal Peoples in Canada (The Circle) was established at the outset of the research partnership six years ago. The Circle established an Indigenous Lead Research Hub and participated in numerous projects, publications and conferences throughout the partnership. PhiLab publications, especially The Philanthropic year, provided an opportunity for The Circle to publish something that was easy to share, and showed that there could be a space for new forms of content that fit with The Circle’s way of working, even within an academic context (the mix of art and coloring pages within the journal for example).

The Circle’s participation in the National Conference challenged PhiLab’s collaboration capacity, but at the same time created an opportunity for The Circle to talk about Indigenous philanthropy and how to conduct gatherings in a new way, in both academic and grantmaking spaces. After the first few years of collaboration, The Circle, to their credit, shifted from validating their approach in a settler philanthropic space, towards sharing and uplifting Indigenous organizations and Indigenous ways of being, knowing and doing.

Administration

With a research partnership as large and complex as PhiLab, administrative challenges were bound to occur. Some of the challenges pertained to the very

environment in which the administrative activities took place. For example, there was difficulty in recruiting and retaining student coordinators for many hubs for several reasons. Hub directors were academic researchers but a student coordinator was meant to take on much of the more daily needs. The importance of having a coordinator was felt throughout as a factor in improving the quality of the partnership and collaboration.

“In our view, allowing a portion of the grant to go towards funding a centralized, full-time, and long-term staff position would be best practice. High turnover at the regional hub made it difficult to ensure consistency. We certainly advise that there be complementary skill sets for both communication and administration.”
Manuel Litalien and François Brouard, Ontario Hub

“We experienced a difficult time recruiting and training local graduate students interested in the Hub’s work. We learned that only students directly involved with the nonprofit/philanthropic sector through their research/program of study or past/current employment were interested in the Hub Coordinator position. We have also concluded that students could be recruited from outside of the Western region and the central Hub could play a key role in assisting regional hubs with student recruitment.” - Iryna Khovrenkov and Lynn Gidluck, Western Hub

In an academic setting, students must balance several priorities and their coordinating role often took second place to other demands. This put added pressure on PhiLab’s central administrative role. As a result, communication coordinator Katherine Mac Donald and administrative coordinator Benoit Martel, both

with the National Hub, were highlighted as pivotal to the project's success.

"The Atlantic Hub has benefitted from the expertise and resources shared from the National Hub. It is easier to maintain a strong regional hub with a coordinator in place. Now that research is underway according to specific themes including climate change, funding for rural or small communities, food systems and decolonizing philanthropy, we as a hub could be ready to build national partners for this theme-based research." - Kelly Vodden and Emily Doyle, Atlantic Hub

"Many of our dissemination projects required a centralized resource to ensure their success, such as the annual PhiLanthropic Year, podcast, monthly special editions and events. The fact that the Hub directors were academic researchers, and the Hub Coordinators were students, both with other responsibilities, made our role of connectors crucial to the wellbeing of the project." - Katherine Macdonald and Benoit Martel, National Hub

There were multiple accountability structures which needed to be put in place. This included agreements between PhiLab and SSHRC, regional hubs, and funding partners as well as fund transfer agreements between UQAM, as the host academic institution, and other universities for each research project. Management, operational and research committees were also put in place where priorities were established, information exchanged, and expectations were established.

Centralized communications and administration, with the flexibility to accommodate regional variations, were key to the supportive role the national hub was able to provide. There were no national initiatives that competed with regional projects, instead they

supported each other. However, each regional and sectoral hub had their own administrative obstacles, be it the sheer expanse of their territory, the lack of student coordinators or changing leadership.

"Western Canada is too big of a region to be represented only by people in one province. We have learned that not having a lead in each Western province presented a challenge of planning and conducting effective knowledge exchange and overall management of activities/events of the Western Hub." - Iryna Khovrenkov and Lynn Gidluck, Western Hub

"We have observed that challenges in maintaining partnership research include capacity within community organizations and the importance of developing organizational relationships rather than just person to person relationships so these partnerships can be maintained even if individuals move on. The continued existence of a regional hub would allow for contiguity with developing research." - Kelly Vodden and Emily Doyle, Atlantic Hub

"While the Indigenous Hub did not have a fulltime coordinator or person dedicated to the partnership, when a person was designated as a liaison, collaboration improved significantly." - Shereen Munshi, The Circle

"The administrative and communications coordination for a network of over 100 research members and collaborators, over thirty students, and 36 philanthropic partners is a challenge in itself. The added complexity of distance,

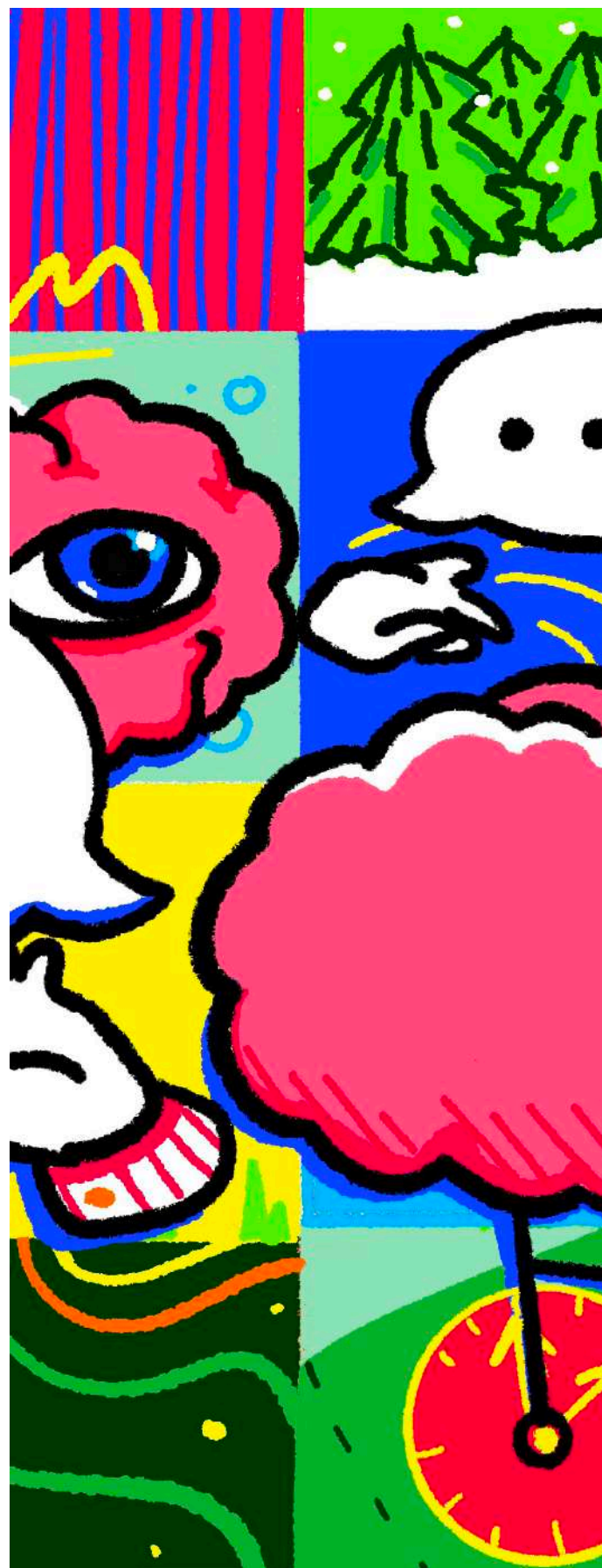
bilingualism and reliance on digital communications for most of the project is a feat that deserves to be highlighted. The complementarity of our two National Hub coordinators played a crucial role in connecting the pieces.” - Katherine Mac Donald and Benoit Martel, National Hub

Conclusion

PhiLab did its best at the outset to design a project that would be as inclusive, accessible and transparent as possible while meeting the research, partnership building and administrative requirements of a project of this size and scope. The adage that “Research that no one knows about might as well not be done at all” lay at the center of our commitment to communication. We strove to communicate often, differently, and well.

We take our hats off to all the research and project funders, partners and collaborators. We value the trust they put in PhiLab to use their funds wisely and to do so to the benefit of the Canadian philanthropic ecosystem. The research conducted under PhiLab was intended to broaden our collective understanding of the philanthropic landscape in Canada, to understand even more about mid-sized and small grant-making foundations, and to collectively understand the extent to which grantmaking foundations support environmental issues and decrease social inequalities.

We have learned a great deal, and we can no longer say that “little is known about the Canadian philanthropic sector”. However, there is still a lot to learn, even more people, we hope, to learn from, and even more partner foundations who embrace research as a key collaborative element in the accomplishment their mission and ultimately a healthier planet and more just society.





DOSSIER SPÉCIAL | SPECIAL FEATURE

Six ans de recherche partenariale sur la philanthropie subventionnaire : qu'avons-nous appris ?

Par le Comité opérationnel du PhiLab

Introduction

Après un premier projet de développement de partenariat du Conseil de recherches en sciences humaines du Canada (CRSH) d'une durée de trois ans, la phase de recherche actuelle du PhiLab a été lancée en 2018 grâce à une subvention Partenariat du CRSH d'un montant total d'un peu plus de 3,5 millions pour durée de 6 ans. Cette nouvelle phase avait comme objectif d'évaluer le rôle et les actions des fondations subventionnaires canadiennes en réponse aux inégalités sociales et aux défis environnementaux.

Depuis le début, le Réseau est un *espace de recherche orienté vers le partenariat, ainsi que le partage et la mobilisation de connaissances* sur la philanthropie et, plus particulièrement, sur les fondations subventionnaires canadiennes.

Le Réseau est divisé en quatre Hubs (centres) régionaux (Ouest, Ontario, Québec et Atlantique) ainsi qu'en deux unités sectorielles dédiées à la recherche en milieu autochtone canadien et en Afrique de l'Ouest. Le Réseau compte aussi sur la présence de chercheur·e·s internationaux. Il réunit des chercheur·e·s, des étudiant·e·s et des membres de la communauté philanthropique pour créer de nouvelles connaissances et partager des informations, des ressources et des idées.

Le Réseau a adopté une posture de recherche orientée vers le partenariat et mène des recherches théoriques et sur le terrain à partir de thèmes, de questions et de problèmes liés à l'histoire et au développement de la philanthropie canadienne. Il vise une meilleure compréhension du rôle de la philanthropie subventionnaire dans la lutte contre les inégalités

sociales et les injustices environnementales. Enfin, il établit des points de rencontre avec la philanthropie à l'extérieur du contexte canadien.

Objectifs du Réseau PhiLab

- Produire et diffuser de nouveaux contenus sur la philanthropie canadienne et les thèmes associés (p. ex. la solidarité nationale et internationale, le bénévolat, la mobilisation communautaire, les innovations sociales, les causes invisibles, la diversité, l'équité et l'inclusion, les pratiques d'octroi de subventions).
- Offrir un espace pour mener et coordonner des recherches.
- Favoriser l'émergence de nouvelles orientations pour la recherche théorique et appliquée.
- Être une référence pour les acteurs du secteur dans le partage et la diffusion des connaissances, des pratiques et des innovations dans le domaine de la philanthropie.
- Organiser des activités scientifiques et de transfert de connaissances.
- Former de nouveaux chercheur·e·s.

Outre la gestion de nombreux projets de recherche, le PhiLab a soutenu des stagiaires postdoctoraux ainsi que l'éducation et la formation d'étudiant·e·s diplômé·e·s. De plus, le PhiLab organise des séminaires et produit des balados, des webinaires et des symposiums qui permettent le partage et la diffusion de nouvelles connaissances. Le Réseau publie également des [bulletins d'information spéciaux](#) et un journal annuel – [L'Année PhiLanthropique](#) – qui présente les travaux les plus récents de ses membres et des auteur·e·s invités.

Le PhiLab en chiffres

- Projets de recherche financés : 93.
- Membres : 95 tout au long du projet + 8 collaborateur·trice·s.
- Partenaires : 36.
- Publications (jusqu'en janvier 2024) :
 - Blogues et entrevues : 285.
 - Journaux : 6.
 - Documents de recherche : 34
 - Balados : 36.
 - Livres édités - français/anglais - 2 imprimés et 1 en ligne.

Revue régionale du PhiLab

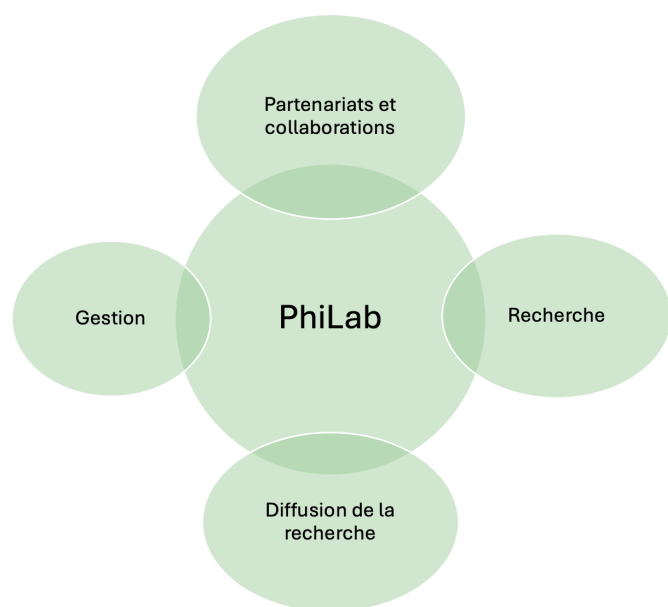
L'équipe éditoriale de *L'Année PhiLanthropique* a pris le temps d'interviewer les responsables des quatre Hubs régionaux afin de leur donner l'occasion de réfléchir à leur expérience dans notre Réseau. Dans les sections qui suivent, nous présenterons une compilation de leurs réponses en lien avec quatre thèmes qui ont émergé de ces conversations. Nous remercions tous ceux et celles qui ont participé, et toutes les personnes, passées et présentes, qui se sont engagées à soutenir la recherche philanthropique au Canada en développant et en guidant le travail des Hubs régionaux.

Superviseur·e·s, coordonnateur·trice·s et directeur·trice·s des Hubs et des unités autochtone et africaine : Benoit Martel (coordonnateur administratif, PhiLab national)

- David Grant-Poitras (coordonnateur, PhiLab Québec).
- Diane Alalouf-Hall (superviseure, PhiLab Québec).
- Emily Doyle (coordonnatrice, PhiLab de l'Atlantique).
- Iryna Khovrenkov et Lynn Gidluck (co-superviseures, PhiLab de l'Ouest).
- Katherine Mac Donald (coordonnatrice des communications, PhiLab national)
- Kelly Vodden (superviseure, PhiLab de l'Atlantique).
- Manuel Litalien et François Brouard (co-superviseurs, PhiLab Ontario).
- Saouré Kouamé (directeur, PhiLab Afrique de l'Ouest).
- Shannon Chernick (coordonnatrice, PhiLab de l'Ouest).
- Shereen Munshi, (animatrice, PhiLab Autochtone).

Thèmes : Faits marquants et observations

Quatre thèmes sont ressortis des entretiens : 1) les partenaires et les collaborations ; 2) la recherche ; 3) la diffusion de la recherche ; et 4) les éléments de gestion.



Partenariats et collaborations

S'il y a une chose à retenir des commentaires relatifs aux partenariats et aux collaborations, c'est que le PhiLab a su créer un espace sans précédent de rencontres entre ses chercheur·e·s et les représentant·e·s des organisations philanthropiques partenaires. Ceci a permis de se connecter et de collaborer.

Depuis les débuts du PhiLab, en 2014, les chercheur·e·s et les organismes philanthropiques cohabitaient dans des mondes relativement séparés et isolés. Aujourd'hui, des chercheur·e·s et des organismes philanthropiques de tout le Canada se sont engagé·e·s dans des relations de recherche durables et mutuellement bénéfiques. Deux de ces projets, l'un entre le PhiLab Québec et la Fondation Mirella et Lino Saputo et l'autre entre le PhiLab de l'Atlantique et les fondations communautaires rurales de Nouvelle-Écosse, ont duré respectivement quatre et cinq ans, et se sont développés autour d'un objectif de recherche commun. Ce processus d'identification et d'exploration des domaines d'intérêt mutuels en matière de recherche et de collaboration a permis d'atteindre un niveau de compréhension et de confiance inégalé dans l'histoire récente de la philanthropie institutionnelle canadienne.

« Le partenariat que nous avons forgé avec la Fondation Mirella et Lino Saputo est un bon exemple de la création progressive d'une relation de

confiance entre nos deux organismes. Ce partenariat, qui s'inscrit dans une approche multipartite plus large, est basé sur un travail de longue haleine qui a débuté avant la pandémie de COVID-19. » Diane Alalouf-Hall et David Grant-Poitrass, PhiLab Québec

Il est apparu clairement que le développement de la confiance et de relations de travail adéquates prend du temps. Grâce à ses activités de financement de la recherche et de valorisation des connaissances, le PhiLab a été en mesure de faire preuve de flexibilité dans la réalisation des objectifs et le développement d'un lien de confiance. La transition vers une culture de collaboration au sein de la communauté philanthropique et de la communauté des chercheur·e·s a été un élément clé. Malgré tout, certaines relations commençaient tout juste à porter fruit dans la dernière phase du projet PhiLab alors que la subvention du CRSH arrivait à terme.

Si les partenariats et les collaborations ont prospéré dans certains milieux, d'autres tentatives se sont heurtées à des difficultés. Ces difficultés étaient liées à des engagements antérieurs et à l'évolution des priorités des différentes parties. Il est aussi important de ne pas sous-estimer l'impact de la COVID-19 et de l'absence de réunions en personne. C'est par le biais de liens personnels ou professionnels que les relations se construisent, et la COVID-19, tout en renforçant les relations existantes par la voie virtuelle, a compliqué l'établissement de nouvelles relations.

« Malgré les difficultés liées à la crise sanitaire, notre partenariat avec la Fondation Mirella et Lino Saputo s'est renforcé, consolidant notre engagement commun en faveur de la recherche sur la philanthropie et les personnes vulnérables, en particulier les personnes âgées. La pandémie a été pour nous l'occasion de relever des défis qui ont renforcé notre relation de confiance et notre capacité d'adaptation à notre nouvelle réalité. Aujourd'hui, nous constatons que

la vision commune que nous avons développée porte ses fruits, suscitant l'intérêt d'autres partenaires désireux de s'impliquer davantage dans l'appropriation des connaissances produites. Cette dynamique de collaboration témoigne de l'importance de la recherche partenariale pour créer un impact social réel et concret. »
 Diane Alalouf-Hall et David Grant-Postras, Carrefour du Québec

Et

« La COVID-19 a eu un impact négatif sur la capacité à organiser des événements en personne. Bien que nos événements virtuels aient été bien suivis et aient reçu des commentaires positifs, nous avons appris que la qualité de nos liens et engagements avec les partenaires régionaux est beaucoup plus forte et plus durable lors des événements en personne. »
 Iryna Khovrenkov et Lynn Gidluck, PhiLab de l'Ouest

« La pandémie de COVID-19 a eu un impact positif sur notre capacité à entrer en contact avec divers partenaires sans avoir à voyager. Nous pouvons affirmer que, grâce à la COVID-19, nous avons pu aller plus loin. Toutefois, les événements et les contacts en personne sont plus propices à l'établissement de relations durables. Le PhiLab nous a permis de réduire la division habituelle entre l'université, les fondations et la communauté. »
 Manuel Litalien et François Brouard, PhiLab Ontario

Ayant été créé plusieurs années avant la crise sanitaire, le PhiLab Québec a pu organiser plusieurs événements en personne, ce qui pourrait expliquer les nombreuses relations solides que ce centre régional a été en mesure d'établir avec les partenaires locaux. Cependant, le PhiLab de l'Atlantique a également souligné sa capacité à entretenir des relations solides avec des partenaires clés, mais en plus petit nombre.

Dans l'ensemble, et tout au long de sa deuxième phase (2018-2024), le PhiLab est devenu un lieu de convergence pour différents acteurs, tels que PhiLab Autochtone, dirigé par Le Cercle, afin de partager leurs visions et idées avec la communauté philanthropique au sens large. Dans ce cas, Le Cercle a pu profiter de son partenariat avec le PhiLab pour raffiner sa propre approche au sein de la philanthropie dirigée par les colons et gagner en visibilité au sein de notre Réseau. D'un point de vue académique, les différents Hubs ont permis aux chercheur·e·s émergent·e·s et établi·e·s de mieux se connaître et de mieux connaître la communauté philanthropique :

« Les professionnels de la philanthropie sont le canal par lequel la philanthropie devient une réalité financière dans notre société civile. Sans leur travail, leurs stratégies et leurs actions, la philanthropie est, au mieux, une activité improvisée, au pire un concept. De même, la mise en relation des professionnels de la philanthropie avec les universitaires permet une réflexivité sur l'action qu'il est difficile d'obtenir lorsqu'on est sur le terrain. »
 Caroline Bergeron, PhiLab Québec

« Avec le soutien du PhiLab, les étudiant·e·s et les chercheur·e·s ont pu développer des relations avec des groupes communautaires qui sont à la fois donateurs et bénéficiaires de philanthropie. En se connectant au PhiLab national et à ses résultats, l'Atlantique a été en mesure de réfléchir et de réagir aux nouvelles

connaissances par rapport aux autres régions du Canada. » Kelly Vodden et Emily Doyle, PhiLab de l'Atlantique

« Le partenariat avec le PhiLab a été très utile pour positionner Le Cercle dans le contexte de la philanthropie dirigée par les colons et nous a donné la possibilité de définir les choses dans la manière dont nous en parlons et dont nous travaillons. » Shereen Munshi, Le Cercle

« Malgré le défi de la distance, le PhiLab Afrique a pu établir des partenariats et des collaborations avec un certain nombre d'acteurs clés. Nous avons notamment organisé une conférence virtuelle en 2022 sur la philanthropie africaine qui a réuni des acteurs du Canada et de divers pays africains et européens. Cette conférence a été l'occasion d'établir des collaborations avec des acteurs clés tels que Trust Africa, Epic Africa, Wings, l'OCDE et la Banque africaine de développement. » Saouré Kouamé, PhiLab Afrique

Parallèlement, le PhiLab a pu favoriser l'émergence de jeunes chercheur·e·s qui se sont orienté·e·s vers des collaborations de recherche dans l'écosystème philanthropique :

« Le PhiLab Québec a joué un rôle important dans mon développement en tant qu'universitaire et continue d'être un élément vital de l'écosystème philanthropique québécois. Mon expérience avec le PhiLab Québec en a été une d'expérimentation, d'apprentissage et de collaboration. Il est composé de chercheur·e·s et d'étudiant·e·s diplômés fantastiques,

ainsi que de coordonnateur·trice·s extraordinaires. » Adam Saifer, PhiLab Québec

« Les projets [de recherche] ont permis aux étudiant·e·s et aux chercheur·e·s de s'engager dans une recherche communautaire. Ils ont abouti, ou pourraient aboutir, à des résultats qui répondent aux intérêts des partenaires et des chercheurs. Ces projets aident à construire une compréhension commune de ce à quoi ressemble la philanthropie au Canada atlantique et de la manière dont ces nouvelles recherches et nouveaux partenariats sont liés à des recherches et à des compréhensions antérieures de la philanthropie dans cette région. » Kelly Vodden et Emily Doyle, PhiLab de l'Atlantique

En résumé, la structure du PhiLab a favorisé l'établissement d'un réseau complexe de liens entre le monde universitaire et celui des fondations subventionnaires, mais aussi entre ces deux communautés.

Recherche

En finançant directement la recherche, le PhiLab a facilité l'exploration de nouveaux thèmes de recherche, lesquels avaient été négligés ou peu investis par le secteur philanthropique (p. ex. la philanthropie et les droits des animaux, le soutien aux personnes âgées et les différentes façons pour les autochtones de s'engager dans la philanthropie et la réciprocité).

Tant de questions, si peu de chercheur·e·s. Dans le meilleur des cas, les chercheur·e·s qui choisissent de se consacrer aux questions philanthropiques sont une denrée rare. Cette situation, plus que toute autre, entrave le développement d'un programme de recherche solide. Même celles et ceux qui essaient de mener des recherches liées à la philanthropie sont en concurrence avec les exigences de l'enseignement et du service aux collectivités, ainsi qu'avec l'orientation « publier ou périr » liée aux critères de titularisation

et de promotion. Bien que la publication d'articles évalués par des pairs ait certainement été soutenue par le PhiLab, son objectif a été, et continuera d'être, de fournir des informations pratiques et dans un format accessible aux organisations philanthropiques et aux praticien·ne·s. En d'autres termes, le contenu est destiné à combler le fossé entre la recherche et la pratique.

« Nous avons eu du mal à recruter des chercheur·e·s pour devenir membres du PhiLab de l'Ouest. Grâce au remue-ménages et à la réflexion, nous avons conclu que les universitaires pourraient être attiré·e·s par ce type de subvention de partenariat si la recherche associée à la subvention pouvait être publiée. » Iryna Khovrenkov et Lynn Gidluck, PhiLab de l'Ouest

« Nous avons eu du mal à recruter des chercheurs·e·s et des étudiant·e·s diplômé·e·s de l'Ontario intéressé·e·s par le travail du centre sur la philanthropie. Nous en avons conclu que les universitaires pourraient être attiré·e·s par ce type de partenariat si les projets de recherche associés à la subvention du CRSH pouvaient être publiés dans une édition spéciale d'une revue scientifique de premier plan évaluée par les pairs ou si leurs travaux étaient publiés dans une presse universitaire réputée. » Manuel Litalien et François Brouard, PhiLab Ontario

Le PhiLab a pu financer 93 projets de recherche à travers le Canada et, dans certains cas, au niveau international. Ces fonds ont permis d'encourager la prochaine génération de chercheurs·e·s universitaires grâce à des postes d'assistant·e·s de recherche, des bourses, des prix et des possibilités de publication.

Le fait de s'adresser à des chercheur·e·s dans des domaines d'actualité tels que l'environnement et

les questions sociales, et de les explorer dans une perspective philanthropique pourrait permettre d'élargir le réseau de recherche. Dans l'avenir, le PhiLab prévoit la mobilisation de chercheur·e·s dans une perspective thématique plutôt que géographique, ce qui permettra d'élargir le spectre de l'engagement.

Les projets de recherche ont été les éléments de base sur lesquels de nombreux partenariats ont pu être établis avec les acteur·trice·s de la communauté. Le PhiLab a facilité ce processus en incorporant une procédure d'examen des propositions de projet très courte et très claire, et en fournissant un financement progressif facile d'accès en deux ou trois étapes. Les obstacles rencontrés sont la capacité à mener des recherches et la disponibilité des chercheur·e·s. Il a également été difficile d'établir des liens entre les chercheur·e·s, une question qui, nous l'espérons, sera abordée dans le cadre de l'orientation thématique.

« Ce dont je suis le plus fier, c'est la manière dont notre équipe a pris des risques en explorant des questions et des thèmes qui ont longtemps été ignorés par les praticien·ne·s et les chercheur·e·s en philanthropie. Par exemple, en janvier 2022, nous avons publié une [édition spéciale sur la philanthropie et les droits des animaux](#) (une cause qui me tient à cœur), avec des contributions allant des perspectives autochtones sur les droits des animaux et l'activisme environnemental radical à la biodiversité et à la philanthropie d'entreprise.

En tant que chercheur·e·s et praticien·ne·s du secteur philanthropique sensibilisé·e·s aux questions de justice sociale et environnementale, la pandémie - ainsi que le meurtre de George Floyd et le mouvement Black Lives Matter qui s'en est suivi - a mis au premier plan des formes croisées de marginalisation, d'oppression et d'injustice dans la

société canadienne. Dans ce contexte, l'équipe du PhiLab Québec a soutenu une diversité de projets menés par nos chercheurs talentueux, explorant des questions cruciales et poignantes telles que l'impact de la COVID-19 sur les communautés marginalisées, l'état de la philanthropie pour les personnes âgées vulnérables, l'insécurité alimentaire, la philanthropie fondée sur la confiance et les collaborations philanthropiques, entre autres. » Adam Saifer, PhiLab Québec

« Il est probable que la stratégie de diffusion la plus prometteuse sur laquelle nous nous appuyons est le fait de s'engager dans la recherche en partenariat et de la soutenir. En intégrant des partenariats dans le processus de recherche, nous sommes en mesure de construire un réseau. » Kelly Vodden et Emily Doyle, PhiLab de l'Atlantique

« Nous avons initié un partenariat de recherche avec WINGS et Trust Africa pour documenter leur projet visant à renforcer les écosystèmes philanthropiques africains. Ce projet de recherche a été une belle aventure, faite de rencontres humaines, de découverte d'incroyables initiatives philanthropiques, ainsi que de la présence d'acteurs clés qui transforment les pratiques des organisations philanthropiques nationales et internationales sur ce continent. » Saouré Kouamé, Anaïs Del-Bono et Amina Wazoumi Ignanoné, PhiLab Afrique

Diffusion des connaissances

La pandémie de COVID-19 n'a pas freiné le désir de diffuser les connaissances. Elle a même créé un désir commun de collaborer à la diffusion des résultats des projets de recherche. Ainsi, en ce qui a trait à la diffusion des connaissances, les deux années les plus productives ont été au cœur de la pandémie, soit en 2020 et 2021, où nous avons publié 120 articles de blogue, réalisé 33 entrevues, publié 3 numéros de *L'Année Philanthropique* et mis en ligne 18 rapports de recherche. On peut dire que cette période a favorisé un ralentissement des activités de recherche et certaines formes de collaboration avec nos membres et nos partenaires autour de l'opportunité de publier et de diffuser nos connaissances.

« De la crise sanitaire est né un désir commun de travailler plus intensément à la diffusion des résultats de nos recherches. Nous avons exploré comment libérer l'environnement de la recherche de ses propres limites académiques afin que ses résultats puissent se répandre dans le réseau du partenaire et dans l'écosystème philanthropique au sens large. » Diane Alalouf-Hall et David Grant-Poitras, PhiLab Québec

L'écart entre ce qui est intéressant ou important pour la communauté philanthropique et ce qui l'est pour le monde universitaire a constitué un défi lorsqu'il s'est agi de décider des moyens de diffuser les résultats de la recherche : blogues, documents de recherche ou articles universitaires.

« Nous avons conclu que cette subvention de partenariat a contribué à réduire le fossé entre l'université et la communauté. Toutefois, il reste des défis à relever en matière d'engagement communautaire efficace. Cela s'explique en partie par le fait que ce qui est intéressant ou important pour la communauté en matière d'application des connaissances

(c'est-à-dire les blogues, les éditions spéciales, etc.) n'est pas reconnu dans le monde universitaire comme faisant partie de l'examen des performances académiques. » Iryna Khovrenkov et Lynn Gidluck, PhiLab de l'Ouest

La grande diversité des contenus a pu créer de la confusion et un manque d'orientation et de structure dans la diffusion des connaissances. Toutefois, les nombreuses possibilités et plateformes de publication ont permis l'accessibilité à différents acteur·trice·s (p. ex. Le Cercle, les partenaires communautaires, les étudiant·e·s, les chercheur·e·s) et le transfert des connaissances dans une variété de formats (p. ex. balados, bulletins d'information, comptes rendus de livres, entrevues, blogues, chapitres de livres, revue de l'Année PhiLanthropique, éditions spéciales de recherche, vidéos, etc.). Les entretiens et les balados ont été particulièrement utiles pour travailler avec certains acteur·trice·s disposant de peu de temps pour participer. Toutefois, sur le plan académique, les articles publiés dans des revues à fort impact et évalués par des pairs restent le moyen de communication de prédilection.

« Lorsque nous avons travaillé sur l'Année PhiLanthropique aux côtés du PhiLab, nous avons un endroit où placer une grande partie de notre contenu afin de pouvoir facilement le partager et le diffuser auprès de nos membres philanthropes et de les atteindre d'une manière claire, compte tenu du ton académique. Cela a été très utile pour nous positionner et nous donner de la crédibilité aux yeux de la philanthropie dirigée par les colons. » Shereen Munshi, Le Cercle

« La communication de matériel original est importante en termes de diffusion de la recherche produite. Cependant, le recyclage de recherches ou d'informations déjà diffusées par nos partenaires de la société civile

n'a pas contribué à la valeur ajoutée [académique] du projet. La diffusion de multiples blogues, de petits articles, de bulletins d'information n'est pas reconnue dans le monde universitaire comme faisant partie de l'évaluation des performances académiques. Le succès du travail universitaire est mesuré par ses « facteurs d'impact », qui sont la clé de la promotion à un poste de professeur associé ou titulaire. » Manuel Litalien et François Brouard, PhiLab Ontario

La langue est une question qui est devenue un défi : que traduire et quand traduire sont des questions qui dépendent de la capacité, de l'adaptabilité et de l'habileté. L'investissement dans une ressource de traduction externe, tant pour le contenu écrit que pour les événements en direct, a été crucial pour notre réussite.

« Il y a eu des défis pour tout traduire, non seulement au niveau de la langue, mais aussi au niveau du contexte culturel. La traduction simultanée pendant les réunions : oui, cela permet de gagner du temps, mais cela coupe aussi la communication entre les membres du comité [de direction]. En termes de connaissances et d'initiatives de recherche, la traduction a permis de créer un pont fonctionnel lors des réunions entre les participant·e·s francophones et le reste du Canada. Ce manque de connaissance mutuelle des développements du secteur est un fossé qui ne profite à personne dans l'ensemble du Canada. » Katherine Mac Donald et Benoit Martel, PhiLab national

Notre engagement à inclure Le Cercle sur la

philanthropie et les peuples autochtones au Canada a été établi il y a six ans, soit dès le début du partenariat de recherche. Le Cercle a créé un noyau de recherche autochtone et a participé à de nombreux projets, publications et conférences tout au long du partenariat. Les publications du PhiLab, en particulier *L'Année PhiLanthropique*, ont permis au Cercle de partager un type de contenu qui n'aurait pu l'être sans leur présence. Ils ont permis de voir qu'il était possible de mettre en place un espace différent pour de nouvelles formes de contenu correspondant à leur façon de travailler, un apprentissage d'autant plus important pour l'environnement académique : p. ex. utiliser l'art et le coloriage dans la publication de *L'Année PhiLanthropique*.

La participation du Cercle à la conférence nationale en 2021 a aussi mis à l'épreuve la capacité de collaboration du PhiLab, tout en donnant à ce dernier l'occasion de parler de philanthropie autochtone et aussi de la façon de mener des réunions d'une nouvelle manière. Après les premières années de collaboration, Le Cercle, et c'est tout à son honneur, est passé de la validation de son approche dans un espace philanthropique dirigé par les colons au partage et à l'intégration de la recherche dans des organismes autochtones adaptés à leurs façons d'être, de connaître et de faire.

Administration

Avec un partenariat de recherche aussi vaste et complexe que le PhiLab, des défis administratifs étaient inévitables. Certains d'entre eux concernaient même l'environnement dans lequel se déroulaient les activités administratives. Par exemple, il a été difficile de recruter et de retenir des coordonnateurs·trices étudiant·e·s pour de nombreux Hubs, et ce, pour plusieurs raisons. Les directeurs·trices des Hubs étaient des chercheur·e·s universitaires, mais un·e coordonnateur·trice étudiant·e devait prendre en charge une grande partie des actions au quotidien. L'importance de la présence d'un·e coordonnateur·trice a été ressentie par tous et toutes comme un facteur d'amélioration de la qualité du partenariat et de la collaboration.

« Nous pensons que la meilleure pratique serait de permettre qu'une partie de la subvention serve à financer un poste centralisé, à temps plein et à long terme. Le taux de rotation

élevé au niveau du centre régional a rendu difficile la cohérence. Nous conseillons vivement de prévoir des compétences complémentaires pour la communication et l'administration. »
Manuel Litalien et François Brouard, PhiLab Ontario

« Nous avons eu du mal à recruter et à former des étudiant·e·s diplômé·e·s localement intéressé·e·s par le travail du centre. Nous avons appris que seuls les étudiant·e·s directement impliqué·e·s dans le secteur à but non lucratif ou philanthropique, soit par le biais de leur recherche ou leur programme d'études ou soit par le biais de leur emploi passé ou actuel, étaient intéressé·e·s par le poste de coordonnateur·trice du centre. Nous avons également conclu que des étudiant·e·s pourraient être recruté·e·s en dehors de la région de l'Ouest et que le PhiLab national pourrait jouer un rôle clé en aidant les centres régionaux à recruter des étudiant·e·s. » Iryna Khovrenkov et Lynn Gidluck, PhiLab de l'Ouest.

Dans un contexte universitaire, les étudiant·e·s doivent concilier plusieurs priorités et leur rôle de coordination est souvent relégué au second plan. Cette situation a exercé une pression supplémentaire sur le rôle administratif central du PhiLab national. Par conséquent, la coordonnatrice des communications, Katherine Mac Donald, et le coordonnateur administratif, Benoit Martel, qui travaillent tous deux au sein du PhiLab national, ont été reconnu·e·s comme étant essentiel·le·s à la réussite du projet.

« Le PhiLab de l'Atlantique a bénéficié de l'expertise et des ressources partagées par le PhiLab national. Il est plus facile de maintenir un centre

régional fort avec un coordonnateur en place. Maintenant que la recherche est en cours sur des thèmes spécifiques tels que le changement climatique, le financement des petites communautés ou des communautés rurales, les systèmes alimentaires et la décolonisation de la philanthropie, nous pourrions, en tant que centre, être prêts à créer des partenariats nationaux pour cette recherche thématique. » Kelly Vodden et Emily Doyle, PhiLab de l'Atlantique

« Bon nombre de nos projets de diffusion nécessitaient une ressource centralisée pour garantir leur succès, comme L'Année Philanthropique annuelle, les balados, les éditions spéciales mensuelles et les événements. Le fait que les directeur·trice·s de centre soient des chercheurs universitaires et que les coordonnateur·trice·s soient des étudiant·e·s, tous deux ayant d'autres responsabilités, a rendu notre rôle de « connecteurs » essentiel pour le bien-être du projet. » Katherine Mac Donald et Benoit Martel, PhiLab national

De nombreuses structures de responsabilité ont dû être mises en place. Il s'agissait notamment d'accords entre le PhiLab et le CRSH, les centres régionaux et les partenaires financiers, ainsi que d'accords de transfert de fonds entre l'Université du Québec à Montréal, en tant qu'établissement universitaire d'accueil, et d'autres universités au Canada et à l'international pour chaque projet de recherche. Un comité de direction, un comité opérationnel et un comité d'évaluation de la recherche ont également été mis en place afin de définir les priorités, d'échanger des informations et de définir les attentes.

La centralisation des communications et de l'administration, avec la flexibilité nécessaire pour

tenir compte des variations régionales, a été la clé du rôle de soutien que le PhiLab national a joué. Aucune initiative nationale n'est venue concurrencer les projets régionaux, qui se sont au contraire soutenus mutuellement. Cependant, chaque Hub régional ou unité sectorielle a rencontré ses propres obstacles administratifs, qu'il s'agisse de l'étendue de son territoire, du manque de coordination étudiante ou de l'évolution à la direction.

« L'Ouest canadien est une région trop vaste pour être représentée uniquement par des personnes d'une seule province. Nous avons appris que le fait de ne pas avoir de responsable dans chaque province de l'Ouest représentait un défi pour la planification et la conduite d'un échange de connaissances efficace et pour la gestion globale des activités et des événements du PhiLab de l'Ouest. » Iryna Khovrenkov et Lynn Gidluck, PhiLab de l'Ouest

« Nous avons observé que les défis liés au maintien de la recherche en partenariat comprennent la capacité des organisations communautaires et l'importance de développer des relations organisationnelles plutôt que des relations de personne à personne afin que ces partenariats puissent être maintenus, et ce, même si les individus partent. L'existence continue d'un carrefour régional permettrait une continuation dans le développement de la recherche. » Kelly Vodden et Emily Doyle, PhiLab de l'Atlantique

« Bien que le PhiLab Autochtone ne disposait pas d'un·e coordonnateur·trice à plein temps ou d'une personne dédiée au partenariat, lorsqu'une personne

a été désignée comme agent·e de liaison, la collaboration s'est améliorée de manière significative. » Shereen Munshi, Le Cercle

« À elle seule, la coordination de l'administration et des communications d'un réseau comprenant plus de 100 membres et collaborateur·trice·s de la recherche, 30 étudiant·e·s et 36 organisations philanthropiques partenaires est un défi en soi. La complexité supplémentaire liée à la distance, au bilinguisme et à la dépendance à l'égard des communications numériques pendant la majeure partie du projet est une difficulté que le PhiLab a réussi à relever, et cet exploit mérite d'être souligné. La complémentarité des deux personnes à la coordination nationale, tant au niveau de la langue que des compétences respectives, a certainement joué un rôle essentiel pour relier les différents éléments du Réseau entre eux. » Katherine Mac Donald et Benoit Martel, PhiLab national

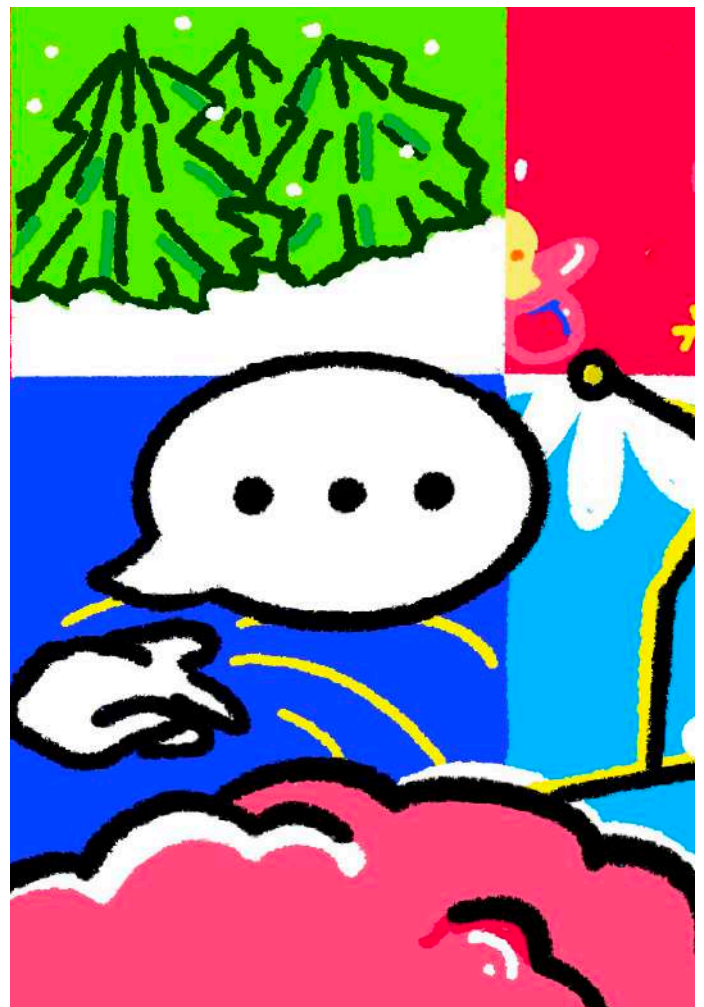
Conclusion

Dès le départ, le PhiLab a fait de son mieux pour concevoir un projet qui serait aussi inclusif, accessible et transparent que possible, tout en répondant aux exigences en matière de recherche, d'établissement de partenariats et d'administration d'un projet de cette taille et de cette portée. Le principe selon lequel « une recherche dont personne ne connaît l'existence pourrait tout aussi bien ne pas être menée du tout » était au cœur de notre engagement en matière de communication. Nous nous sommes efforcé·e·s de communiquer souvent, différemment et efficacement.

Nous félicitons tous les bailleurs de fonds, les

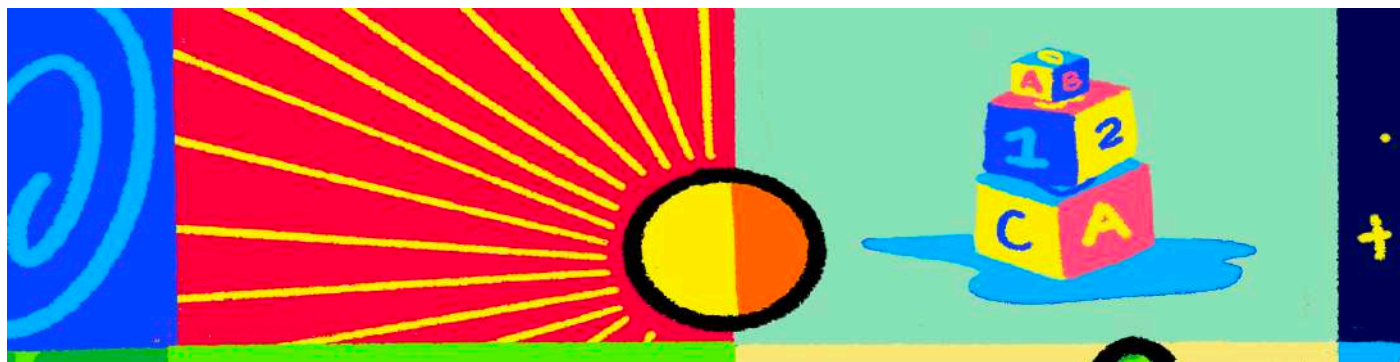
partenaires et les collaborateur·trice·s de la recherche et des nombreux projets réalisés. Nous apprécions la confiance qu'ils et elles accordent au PhiLab dans l'utilisation de leurs fonds et au profit de l'écosystème philanthropique canadien. La recherche menée dans le cadre du PhiLab avait pour but d'élargir notre compréhension collective du paysage philanthropique au Canada, de mieux connaître les petites et moyennes fondations subventionnaires, et de comprendre collectivement dans quelle mesure les fondations subventionnaires soutiennent les questions environnementales et réduisent les inégalités sociales.

Nous avons beaucoup appris et, désormais, nous ne pouvons plus dire que « l'on sait peu de choses sur le secteur philanthropique canadien ». Cependant, il y a encore beaucoup à apprendre, encore plus de gens, nous l'espérons, avec qui apprendre et encore plus de fondations partenaires qui considèrent la recherche partenariale comme un élément clé de collaboration dans la réalisation de leur mission et, ultimement, vers une planète plus saine et une société plus juste.



ÉTUDES DE CAS | CASE STUDIES





ÉTUDES DE CAS | CASE STUDIES

Linking audience inspiration and philanthropy: Post-pandemic learning in the cultural sector

By Wendy Reid, *Honorary
Professor in Management at HEC Montréal*



With an MBA and Ph.D. in Organizational Behaviour from York University, **Wendy Reid** is Honorary Professor in Management at HEC Montréal. Her research interests include leadership, governance, and philanthropy in arts nonprofit organizations, informed by her 25-year management career in the sector, prior to her university tenure. In Toronto, Wendy was awarded Marketer of the Year by the American Marketing Association in 1989.

This reflection for the PhiLab Philanthropic Year, 2024, discusses the nature of organizational business models found in the cultural sector and how they influence philanthropic practice in the sector. While philanthropic practice is understood as sharing key principles like relationship building with individuals, corporations, and foundations, as well as making a case for support, each sector appears to deploy specific and unique means to realize its needs for recruiting philanthropic support.

Ostrander and Schervish (1990) help us understand the sectoral variation in social relationships amongst donors, recipients who organize and deliver donations, and beneficiaries who are the focus of

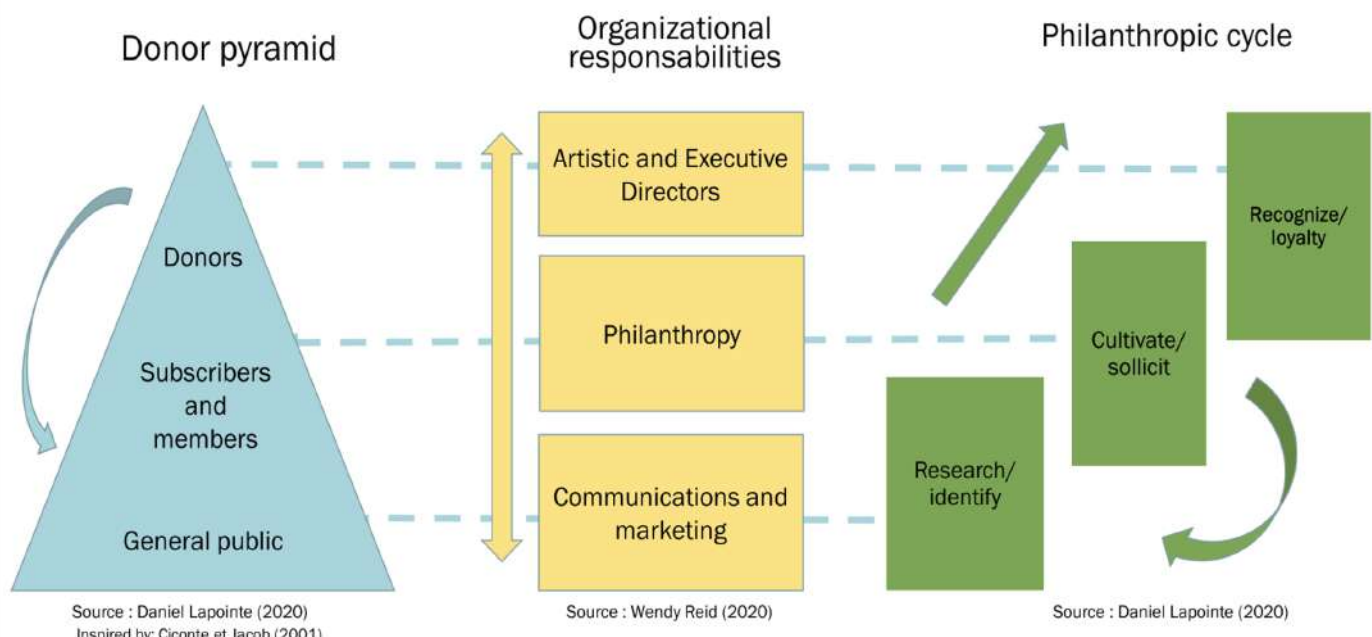
the cause. Ostrander and Schervish have analyzed relationships according to the origins and objectives of the partnership, and whether the focus is on the beneficiary, the recipient, or the donor. As a result, the authors debate how instrumental the donors may be in their motivation and engagement. The structure of the roles in the relationships helps us to understand the possibility of different philanthropic business models. Ostrander and Schervish further argue that relationship dynamics generate strategic considerations for philanthropic professionals as they realize their responsibility to produce revenue for the mediating recipient organization.

In the arts and cultural sector, the philanthropic pyramid (see Figure 1) involves a hybrid variation of revenue sources. Relationships in this pyramid start with an expression of interest through a ticket purchase to a performance or an exhibition. This commercial exchange involves a direct experience with artistic creation, and performance. This experience can ultimately be transformed into a philanthropic relationship as a consequence of the proximity between these potential donors and the organization's philanthropic professionals. While this strategy is

parallel to educational and health care philanthropy where alumnae and former patients are identified and solicited for support, the cultural field is unique in that it enables direct conversations with donors while they are in the process of experiencing art and sensing the impact of artistic inspiration. Ostrander and Schervish (1990) argue that the cultural field combines both consumption philanthropy, and mediated philanthropy where the recipient organization may include donors as beneficiaries. The model that is presented in Figure 1 suggests how three concepts inter-relate within and around an arts organization.

cancelled or closed. Eventually, artists and cultural workers responded creatively, and performances were broadcast through on-line media platforms. Unfortunately, these were expensive adaptations. Media performance rights required additional payments above the normal rate paid to an artist for performing live. In 2023, performances and exhibitions returned to a pre-pandemic format, but attendance has been variable and often, much reduced. Given the key relationship between buyers and donors, this fallout impacted the possibilities for philanthropy in the arts (Reid, 2020; Reid, 2024).

Cultural marketing and philanthropy



Graphic conception: Marie-Ève Collin

The multi-level connection across the pyramid, the organization and the cycle of philanthropic engagement shows how the relationship among communications, marketing, and fundraising functions to develop philanthropy revenue in the arts and museum sector. Art, artists, and audiences of all kinds benefit from the philanthropic support of these organizations. While many of these beneficiaries are not donors, donors can also be beneficiaries.

To understand contemporary cultural philanthropic practice, I consider the COVID-19 pandemic, since its impact was particularly demanding in arts and culture, and the process of returning to 'normal' has not been easy. When the pandemic was declared in March 2020, performances and exhibitions were

Ironically, during the pandemic, loss of ticket revenue and a live audience also generated sympathy among current donors and, like other sectors, fostered a new level of philanthropic engagement. In some organizations, however, it has been difficult to maintain individual donor motivation. In Québec, where cultural philanthropy has been underdeveloped until recently, benefit and gala events had been the vehicle for a form of philanthropic funding which could not be produced during the pandemic. Philanthropic donations became a new consideration for revenue. In 2020, an initial campaign involving donations of unused tickets developed some useful donor relationships with ticket buyers in many companies. Ironically, the pandemic was an opportunity to test and evolve (Reid, 2024). Several organizations made use of the newly available time while not performing

to develop their internal resources like databases and their professional philanthropic skills. Annual philanthropic campaigns and recognition events have become more frequent and legitimized philanthropic practices in the cultural field.

Currently, arts organizations and museums are discovering the audience's new preferences for their artistic experiences. Some events are very successful with large audiences and others are not. Examples of great success cover both sides of risk. New creations like 'la Reine-garçon' (the Boy Queen) written by Michel Marc Bouchard and composed by Julien Bilodeau at the Opéra de Montréal as well as established classics like *Le Misanthrope* at the Théâtre de Nouveau Monde, both in Montréal in early 2024 have been successful artistically and with full houses. On the other hand, some very established plays like *King Lear* performed by television star Paul Gross at the Stratford Festival were not so well sold. As well, the Christmas concert of Les Violons du Roy in Montréal was cancelled at the end of 2023. This is normally a sold-out experience. While care and thought are being put into the programming, the result is not always as expected, and it requires new learning to understand audience preferences that line-up with artistic mission priorities.



The related impact on philanthropy is also a learning process. For arts and heritage organizations in English Canada, philanthropic skills have been taught since the 80s and 90s. As a result, their programs have been well developed, and strong donor support has evolved. This support was sustained through the pandemic. In Québec, that same training only began ten years ago in response to initiatives from the Conseil des arts de Montréal and the arts management program at HEC Montréal. These training programs are discussed in the

special issue on cultural philanthropy in the PhiLab's newsletter in September 2023 (Wilson, 2023). Other peer training and sharing programs in the cultural community in Québec are also discussed in this issue. Approaches specific to the arts and heritage as well as general philanthropic techniques are covered through these programs and thus support a fast-growing community of philanthropic professionals in the arts and heritage field in Quebec.



For arts and heritage organizations in English Canada, philanthropic skills have been taught since the 80s and 90s.



The 2023-24 season has provided an important learning opportunity for the cultural sector about the relationships among audiences, donors, artists, and their organizations as they confront the return to in-person live events. While general enthusiasm is evident, caution and careful planning are proving to be necessary. Nothing is as it was in the past and patience is advised. Using the proximity of audiences and donors in this sector as a philanthropic business model helps everyone to understand the potential for growth and to gain insights into why growth may not occur. The sector's event-based marketing approach can generate efficient philanthropic campaigns and programs. However, organizations need to develop a culture of philanthropy and coordinated resources such as integrated box office and donor databases, and experienced and well-trained philanthropic professionals who understand the cultural sector.

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The 2023-24 season has provided an important learning opportunity for the cultural sector about the relationships among audiences, donors, artists, and their organizations as they confront the return to in-person live events. While general enthusiasm is evident, caution and careful planning are proving to be necessary. Nothing is as it was in the past and patience is advised.

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The Ivey Foundation's 'Spending Up' Policy: A Strategic Decision for Environmental Change

By Katherine Mac Donald, *PhiLab Network Co-Coordinator*; Dr. Bruce Lourie, *President of Ivey Foundation*



Katherine Mac Donald is PhiLab's Co-coordinator. She is responsible for all of the Network's communications, be it external or internal. This includes managing the website, newsletter, social media, publications, etc. In addition, she is responsible for building connections among and between PhiLab's members and partners to ensure a better mobilization strategy.

Dr. Bruce Lourie, PhD is a best-selling author, policy expert, social entrepreneur, and award-winning global sustainability leader. In addition to serving as President of the Ivey Foundation, he is a Senior Fellow of the Institute for Sustainable Finance and Guest Lecturer at the Oxford Social Finance Program. He is active on many boards, including the Canadian Climate Institute, SeedChange Foundation, and the Transition Accelerator, and formerly the Independent Electricity System Operator and Ontario Trillium Foundation.

Bruce is best known for bringing collaborative solutions to major environmental challenges such as phasing-out coal and establishing the Ontario Greenbelt. He has been instrumental in the creation of over a dozen organizations that play critical roles in sustainability in Canada and abroad.

Katherine Mac Donald (KM): Bruce, let's begin with you telling us a bit more about how you initially got involved with the Ivey Foundation.

Bruce Lourie (BL): Before I joined the Ivey Foundation, I had my own consulting company, which focused on solving environmental problems, toxic pollution, climate change, and the energy transition. My first foray into philanthropy was when I ran the Laidlaw Foundation's environment program. By exploring different approaches, I started up projects like the Sustainability Network and what is now Environment Funders Canada. I was always big on how we can enhance collaboration to solve problems. The Ivey family knew of me through that work, and they approached me to run their foundation, which I eventually accepted.

KM: You play a dual role at the Foundation as both President and spokesperson, how did that come about?

BL: My more public-facing role developed over time. When I joined the Foundation twenty years ago, it wasn't common for foundations to be so public, it was seen as inappropriate. Hiring someone with subject

matter expertise was also not something that was done often. However, I had been running NGOs and developing government relations for 15 years, this was just the way I operated, and continued doing so at the Foundation. As we built up our credibility on different issues and hired senior experts, we began being approached for our expertise, not just our funds.

We were able to take advantage of our unique position and have become very active. We see ourselves as peer partners with our grantees, with each organization having its skills and resources. For example, some might have more access to their members, and very bright people running their organizations. The Foundation has its financial resources as a major asset to support its work, but overall, we work very collegially with what we refer to as our core organization organizations.



As we built up our credibility on different issues and hired senior experts, we began being approached for our expertise, not just our funds.



KM: The Foundation's capital gives it great financial independence. What unique role does that give you?

BL: As a consultant, I worked more with businesses, and now I work with NGOs. When either of these groups talk to the government, it is usually with some form of undercurrent of a financial motive: be it a tax break, an investment, or government funding. My position at the Foundation has always been to bring people from all sides of an issue together to find solutions. We have deliberately positioned ourselves to have credibility with governments, businesses, and NGOs while being in a neutral convening position of not requiring any public resources.



We have deliberately positioned ourselves to have credibility with governments, businesses, and NGOs while being in a neutral convening position of not requiring any public resources.



KM: Given your influential role, when the Foundation announced it would be spending its entire endowment in a few years¹, it made waves. What led to this major decision and why is it a “spending up” policy and not a spending down or sunset policy?

BL: Let's start with the terminology². The Ivey Foundation has always been very intentional with the words we use. In this case, the terms come from business language as in when you are winding up, the corporate entity is disappearing. Whereas spending down is less clear, it might mean something will remain, which is not our goal.

Regarding how the Foundation came to this very big decision, it came from the family. After watching this incredible project evolve and being on the board for decades, the four siblings were all approaching retirement. They sat down and had to decide the Foundation's future. From a philanthropic philosophical perspective, there is a very strong sense that foundations need not exist in perpetuity¹. There are many compelling reasons why, for the public good, it makes more sense to disperse the entirety of the capital, instead of letting it dribble it out over many years. There is a good quantity of literature on the topic that questions the creation of wealth and the benefits of the establishment of a foundation for

the people of the day. Does it truly help to slowly distribute the funds over countless years? This was the most compelling piece for the family.

Finally, the Foundation's focus on the energy transition and climate change, one of the most urgent issues of our time, was yet another argument. If this is truly one of the most pressing issues of the day, then perhaps putting all the money behind it was the way to approach it. From my own professional and personal perspective, we have made commitments to achieve certain objectives by 2030 in terms of addressing climate change, and that is only 6 years away. Wouldn't it be great if we ramped up what we are already doing, and focused on putting in place the structures, mechanisms, and institutional capacity needed to reach those objectives? From what we were seeing, Canada was not taking those steps and it would still be very difficult to achieve those 2030 targets. However, the choice was made to put our money where our mouths were and go all in.



KM: Once the seed was planted, what were the next steps? How were the next steps mapped out?

BL: We spent several years researching the benefits, implications, and opportunities. What had other foundations done or what were they doing? An extensive amount of thought went into the decision, it was not taken lightly. There were some good case studies from the United States. I have always been interested in how other foundations approach their decisions.

KM: This is a sentiment we share here at PhiLab. By sharing case studies from different foundations, we can shed light and disseminate knowledge to the whole sector. Are there any main insights you could share from your research for other foundations exploring this direction?

BL: First and foremost, you must decide if this is the right decision for your foundation. Second comes

how it will unfold, depending on your endowment and programming. Should it happen over five, ten, or twenty years? Certain foundations have provisions where the foundation will come to a close when the founder passes. I feel that more and more foundations are being designed to wind down, even from the outset. Once those fundamental decisions have been made, the process is quite straightforward, at least from a business perspective. One potential distinction for the Ivey Foundation is that, as a very focused foundation, we knew exactly what we wanted to do. We had long-standing relationships with organizations, which was another factor in the decision. We trusted the partners we were working with; we knew our money would be well spent. This was a determining factor, which might not be the situation for foundations that do not have as clear a direction.



We trusted the partners we were working with; we knew our money would be well spent.



KM: Would you say foundations that work on recurring needs or direct support instead of crises are less likely to consider sunseting or winding up?

BL: Precisely. For instance, if a foundation mostly funds one institution, say a hospital wing, it might not make sense as a decision. In our case, we had a group of people that we worked very closely with and who formed the leading thinkers and actors helping Canada address climate change. We were confident we were working with the best people in the country. The decision to give them the resources they needed to do what needed to be done was an obvious one.

We take a system approach in which we are trying to build the systems that will get us on track to transition toward a low-carbon economy. Again, this is quite different from funding food banks, or mental

health services. Even then, you'd like to think that a large investment in trying to solve a systemic problem might be more successful than funding solely the manifestations of the problem. Which is a completely different discussion. For the Ivey Foundation at least, we are systems and policy-focused, which is not all that common in philanthropy.

KM: By building these strong relationships with your partners over time, the Foundation is funding the implementation of the system that can then be perpetuated by civil society. Would it be fair to say the Foundation engages in a form of trust-based philanthropy?

BL: In some interpretations of trust-based philanthropy, one might think it means funders don't ask any questions and simply distribute funds and let them do what they want. That is not how we work. We get to the point with our partners where they trust us and we trust them. We talk with many of our partners daily, we are part of the same team. That is a very different form of trust-building that can only happen over many years. It is not a slogan that can be easily thrown around.

KM: What role do you see for foundations facing the environmental crisis regarding both internal and government policies?

BL: To be honest, what I find frustrating is when a very smart business person hires the best people for their business strategy. Then, they decide to start a foundation, almost as more of a hobby. They don't bring that same level of rigor, expertise, and strategy to their philanthropy. If more foundations realized they could bring the same strategic and entrepreneurial skills they used to grow their wealth in their philanthropy, they would be more effective.

In addition to there being a lack of business leadership in Canada around the energy transition, and environment issues generally, there are family or corporate foundations with ties to business that could leverage their connections and influence, their expertise and apply it to mitigating climate change. We are seeing some success with that. Foundations do have a great power of convening, and they each have their spheres of influence. Whether it be a family in a particular province or city, they are well connected, they know people and have resources that can be mobilized for positive change. This can be for social, cultural, or environmental issues mind you.



KM: If I can summarize, foundations can play different roles. They are financially independent, they might have subject matter expertise, and can bring the right people to the table. Do you see any other roles?

BL: I believe it is important for foundations to have a strategic outlook on philanthropy. Many talk about strategy, but few implement it because it is a challenging piece. The reason a Foundation establishes guidelines is to figure out who they don't fund more than who they do. This is more difficult than funding any initiative that is related to "the environment" for example. You end up funding a small group of people working on implementing a specific strategy.

KM: I can make an analogy to writing a good paper. The shorter it is, the more challenging it becomes to select what needs to be written.

BL: Precisely. When you focus on a specific goal, on what is important and will have the most impact, it changes the entire business model. You are no longer giving out grants to any organization. This is where true philanthropic strategy shines, and this is the approach the Ivey Foundation has adopted, especially as we choose to wind up our activities.

KM: Thank you for sharing your insights on strategic philanthropy with us today Bruce, we truly appreciate it.

Notes

- 1 Find the Ivey Foundation's announcement here: [Ivey Foundation to wind up, granting \\$100 million endowment over the next five years.](#)
- 2 For more information on philanthropic terminology, we invite you to consult [PhiLab's glossary.](#)
- 3 For more content on the issue of Perpetuity, we invite you to consult PhiLab's special edition on the subject: [Philanthropy & Perpetuity.](#)



ÉTUDES DE CAS | CASE STUDIES

The Influence of Religious Philanthropy on the Cause of International Aid in the Netherlands – A Comparison of Three Organizations

By Gertie Kreling, M.A., *philanthropic consultant for Allergies Québec and student in the Philanthropic Management certificate program at Université de Montréal*



Gertie Kreling has a master in public administration and is a student in Philanthropic Management at the Université de Montréal. She currently works as a philanthropic consultant for Allergies Québec and is also on the 'Prix d'excellence' committee of the Quebec chapter of the Association of Fundraising Professionals.

Introduction

The Netherlands is undergoing a rapid process of secularization. In 2010, 55% of the Dutch population aged 15 or over said they were linked to a religious community, and 18% said they attended a religious ceremony once a month or more. By 2022, these numbers had declined to 43% and 12%, respectively (Schmeets and Houben, 2023). The graph below illustrates this trend (fig.1).

The impact of secularization has been felt in the mobilization of donations. A study by Monsma (2007) indicates that Catholics have a 146% higher propensity to donate than the religiously unaffiliated. For Protestants, the difference is 714%.

As a result, the decline in the number of religious people has led not only to a reduction in the total amount

donated, but also the frequency of donations. The 2017 and 2020 reports (« Geven in Nederland 2017 ») (« Giving in the Netherlands 2017 ») show a decrease in the total amount donated in the Netherlands.

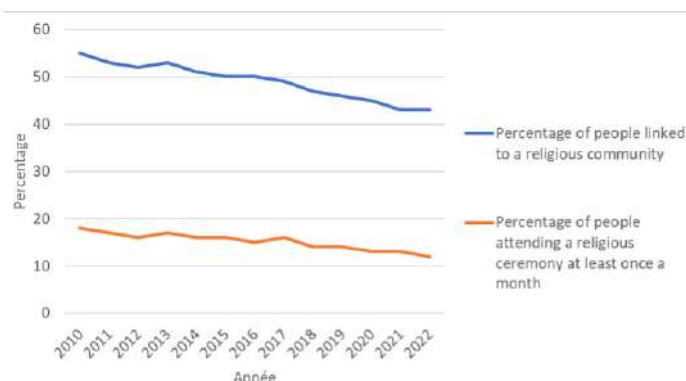


Fig 1. Trends in religious involvement in the Netherlands, 2010-2022 (Schmeets and Houben, 2023)

Religious causes remain important in terms of individual donations (in terms of dollar amount donated) as does international aid, because of the links it has with the religious dimension, according to Bekkers and Schuyt (2008). Even so, in 2020, donations to religious causes and international aid fell considerably from 2018.

In light of this increasing secularization, the current research explores the influence of religious philanthropy on international aid in the Netherlands. The aim of the project is to determine whether or not religious organizations are—or should be—adapting to these cultural shifts in order to attract more donations and donors.

Research question and methodology

The following text represents a summary of an exploratory research study conducted in the summer of 2023 on the influence of religious philanthropy on international aid in the Netherlands. The methodology involved a literature review, three interviews and a case study of three organisations in order to find an answer to the research question: **“What is the influence of religious philanthropy on the cause of international aid in the Netherlands?”**. A link is provided at the end of the text to read the whole study.



Currently, a small number of donors is responsible for most donations in the Netherlands. However, the number of donors is declining.



Religious philanthropy in the Netherlands: A literature review

Prior to the establishment of the welfare state in the Netherlands in the early 20th century, Christian elites were primarily responsible for the relief of the poor. Dutch society was structured around four moral pillars: Catholic, Protestant, Social Democratic and Liberal. Each had its own charities dedicated to the needy. With the emergence of the welfare state in the early 20th century, the government became the main institution for the provision of public services dedicated to health and education, while the non-

profit sector continued to provide complementary services (Wiepking and Bekkers, in Wiepking and Handy, 2015, p.211, 212).

Throughout Europe, including in the Netherlands, Christian churches have played a crucial role in shaping the culture of philanthropy. Despite a decline in membership, these churches, and religion in general, remain important players in philanthropy, being seen as essential to the alleviation of social problems (Grönlund and Pessi, in Wiepking and Handy, 2015, p.562).

Currently, a small number of donors is responsible for most donations in the Netherlands. However, the number of donors is declining. Philanthropy is increasingly dependent on a small core of Protestant individuals, who grant significant amounts of money, mainly to religious causes (Bekkers et al., 2022, p.268).

Bekkers and Schuyt (2008) identify two elements that explain the influence of religion on giving and volunteering: conviction and community spirit. Conviction refers to the religious opinions, norms and values that motivate giving, while community refers to a social context and pressure to give. Considering the small number of religiously affiliated people, donations to international aid in the Netherlands are mostly based on the conviction element and not the community, according to Bekkers and Schuyt (2008).



Conviction, fuelled mainly by religious values, has long been a major driver of donations to international aid.



Discussion of the results of our study

Contrary to widespread perception, the international aid organizations that are subject of this case study are not necessarily experiencing a decline in donations.

Rather, they are facing an increase in the difficulty of collecting them. The data from the interviews we conducted indicate a more positive outlook than that emerging from the literature review on the subject. Thus, while there is no net decline in donations received, it seems that international aid organizations have had to redouble their efforts to mobilize financial support.

Conviction, fuelled mainly by religious values, has long been a major driver of donations to international aid. However, this conviction is now showing signs of decline, as are other religious motivations for giving. Although the combined influence of conviction and community may still motivate Dutch men and women to contribute to international aid, conviction, which incorporates pro-social values, remains predominant.

A concrete example of this dynamic is provided by **ZOA**, where donors, despite sometimes leaving the church, continue to give because of their persistent attachment to Christian values. However, all motivations based primarily on religion, such as altruism, prosocial values, psychological benefits, solicitation and reputation, are in decline. This trend translates into a decline in generosity towards causes traditionally popular among religious individuals, including international aid.

The impact of secularization on donations to international aid organizations varies according to each of the organizations studied. **Solidaridad** attributes part of the drop in donations to the death of elderly donors, a phenomenon accentuated by individualization. At **Bijzondere Noden**, although the effects of secularization are not significantly felt, the previously observed disposition to donate seems to have diminished, underlining the growing importance of narrative and explanation of the organization's actions in attracting donations. ZOA, for its part, believes it is not strongly impacted by secularization, citing the enduring loyalty of some Protestant donors and their attachment to values even after leaving the church.

ZOA is an international aid organization, with Protestant origins and based in the Netherlands.

ZOA is an international relief and recovery organization. Its mission is "to support people suffering from armed conflicts or natural disasters, helping them rebuild their homes and livelihoods and live peacefully in stable communities." The organization was founded 50 years ago by 3 Christian students who wanted to help people in Southeast Asia. Today, it is active in 15 countries worldwide and implements projects in education, peacebuilding, housing, emergency aid, food security, water and hygiene, land rights, and cash assistance. (<https://www.zoa-international.com/about>)

Solidaridad is an international civil society organization. The organization was established by a few Catholic bishops in the Netherlands who wanted to contribute to development in Latin America through an Advent campaign. It has been in existence since 1969, for over 50 years, and is active today in more than 40 countries. Its mission is "to enable farmers and workers to earn a living, shape their own future, and produce in balance with nature by working throughout the supply chain to make sustainability the norm." It aims to create resilient communities around all these actors in low- and middle-income countries. (<https://www.solidaridadnetwork.org/>)

Bijzondere Noden (Council of Relief of the Reformed Congregations in the Netherlands) is an international aid organization with Reformed Protestant origins based in the Netherlands. Bijzondere Noden differs somewhat from other charities mentioned in this research because it has direct links with the Reformed congregations (Gereformeerde Gemeenten) in the Netherlands. Bijzondere Noden believes that God demands serving and helping others, as written in several places in the Bible. The organization provides humanitarian aid in disasters but also implements more structural projects aimed at improving the quality of life of those affected. It helps persecuted Christians because of their faith and supports and accompanies diaconal projects focused on proclaiming the gospel abroad. (<https://bijzonderenoden.nl/english/>)

Conclusion

Religious philanthropy has historically played a significant role in international aid donations. This influence persists. For Protestant organizations, this form of philanthropy remains crucial, stimulating donations and contributing to the maintenance of close links with their religious origins.

Despite ongoing secularization and the need to adjust approaches, donors continue to support organizations in need, even by increasing the amounts of their donations. This contrasts with the findings of the literature review, which indicated a future decline in Protestant giving.

Religious philanthropy, on the other hand, appears to have a negative influence on Catholic organizations, with a decline in donations received. Another aspect to consider is the high average age of donors, particularly observed by ZOA and Solidaridad.

Given the trend towards younger generations being less religious, this could lead to a decline in the number of donors in the years to come.

Our exploratory research underlines the continuing importance of religious philanthropy in the Netherlands, while highlighting the possible future implications of secularization, especially in relation to the younger generation. For a more in-depth understanding, more detailed studies that incorporate additional organizations, factors influencing generosity, and quantitative data, would be required.

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Rural Philanthropy in Canada

By Kelly Vodden, Professor at Memorial University; Francois Brouard, Professor at Carleton University; Manuel Litalien, Associate professor at Nipissing University; Laurence Croteau, Master's graduate at UQAM; Tuyet-Anh T. Le, Ph.D. Candidate at Memorial University; Alex Petric, Ph.D. Candidate at University of Waterloo

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Residents and communities in rural, remote, and Northern regions of Canada rely heavily on philanthropy to support community well-being. This includes financial donations made by individuals as organizations, such as community foundations. Philanthropic giving has long been a part of societies in what is now known as Canada, with giving and sharing being a fundamental aspect of Indigenous cultures (Bérard, 2021). In a 2019 Special Edition of the PhiLab Newsletter focusing on Rural Philanthropy, the former chair of the Rural Communities Foundation of Nova Scotia adds that rural communities are “philanthropic places”, where community members often help support friends, neighbours, and family members by raising funds and lending a helping hand where it is needed (Reid, 2019). Also writing about Atlantic Canada, Chouinard et al. (2006) argue that community development in Atlantic Canada is largely undertaken by non-profits and cooperatives. Lorinc (2019) argues that “in many ways, ‘rural philanthropy’ is nothing more than a short-hand phrase for describing core social norms and conventions that have long characterized small and sometimes isolated communities across Canada.”

Parlee (2014) further explains how social economies, dependent upon social capital, have assisted northern communities to adapt to and cope with ongoing change and to pursue opportunities for their development and sustainability. Indeed, as rural regions see cutbacks to government services and in some cases the withdrawal of private sector services as well, they rely increasingly on an often strained social sector to continue providing services and supports for residents (Gibson & Barrett, 2018; Ryser & Halseth, 2014). Despite the significance and particularities of rural philanthropy, research related to philanthropy in rural Canada is limited (Squires, 2022; Levett, 2021). In this case study, and in the PhiLab research it touches upon from across the country, we seek to contribute to filling these gaps.

What is rural?

The definition of “rural” should be somewhat straightforward, notably referencing characteristics related to the countryside seen to be in stark contrast with city attributes. Following this logic, rural philanthropy could take the form of charitable initiatives located in the countryside by any individuals or organizations. However, the term “rural” is ultimately more slippery than originally thought (Brouard et al., 2023). It is highly subjective and politically motivated. Not all rural regions are equal, as some may dominate

others and/or have opposing qualities or contrasting realities. One such illustration is the social and economic contrasts between rural areas with and without high-speed internet. Regardless of how rural regions are described and compared, they are not all holding the same sociopolitical weight. The term rural, therefore, often foregoes the complexity of the needs and realities of each rural community.



The term rural provides a false sense of homogeneity grouping all rural regions under one umbrella.



Another difference between rural communities is that some are located near a city, while others are hours away by plane from health care (or other) services, or from provincial, territorial, or federal decision-makers (Bollman & Reimer, 2018). Rural communities have unique needs and financial challenges due to their geographical location. A dollar donation in Toronto does not go as far in Attawapiskat, where groceries can easily cost 45% more. Additionally, rural northern communities are particularly vulnerable to the effects of climate change. They also often present aging infrastructures and tend to be on the wrong side of the digital divide. Hence the distinction between “peripheral rural communities”, “intermediate rural communities”, “remote rural communities”, and “isolated rural communities” is useful (Coop Carbone, 2018). Considering these distinctions, the term rural provides a false sense of homogeneity grouping all rural regions under one umbrella. Rural philanthropy includes diverse geographical distribution and specific challenges for local social initiatives and non-profit organizations no matter the contour of the definition.

In this context, a clear, universally accepted definition would help substantially in coordinating efforts from both the public and the private sector. It is however absent, whether at the government level (Canada

Post; Statistics Canada, etc.) or in the nonprofit sector (United Way, Aspen Institute etc.). Clearer definitions, while challenging to establish, would help define boundaries for philanthropic individuals and organizations and provide a direct impact in terms of “[where and] what they fund, how they fund, with whom, and how they view their responsibilities in communities” (Phillips & Scaife, 2017, p. 1; see also Clerkin et al., 2013).



In the end, it seems the sometimes harsh realities confronted by rural communities hold more consensus than debates over definitions of “rurality” might suggest, such as an aging population or retreating social safety nets by all level of governments for seniors.



Existing classifications such as rural and small town (RST) areas or Population Centres (POPCTR) present advantages and limitations while illustrating an attempt to establish common ground on what is “rural”. Based on population density, the POPCTR is the most common rural-urban classification, yet the narrow focus on population can be limiting and distorting (Subedi et al., 2020). Furthermore, “rural population” is typically identified as individuals living outside metropolitan areas, cities, town, or villages of more than 1,000 inhabitants (StatisticsCanada, 2022a). As with the elusive term “North”, some definitions are single factor (populations) or multi-factor (e.g., population size [under 1,000] or density

[under 400 per square km]; labor context; settlement context). The OECD’s “rural communities” threshold uses a population density of less than 150 people per square kilometre (du Plessis et al., 2002). In the end, however, it seems the sometimes harsh social and economic conditions facing rural communities may be more relevant to residents than debates over definitions of “rurality” might suggest, such as an aging population or retreating social safety nets by all level of governments for seniors. These phenomena have real-world impacts as they increase the burden on the social service sector, the philanthropic sector, small rural charities and rural foundations (Ivany, 2021).



Gibson & Barrett (2018) and others have noted that over 40% of all community foundations are based in rural areas, despite being home to less than 20% of the population.



Key themes from existing literature and statistics on rural philanthropy in Canada

An analysis of Canada Revenue Agency (CRA) T3010 Registered Charity Information Returns filed for the 2006-2020 period demonstrates that there were nearly three times as many charities based in urban areas than in rural regions¹ over the period (e.g., 62,549 and 21,793, respectively on annual average) (Le et al., 2024)². This gap narrows in some provinces, however. In Atlantic Canada, for example, 48.4% of charities were located in rural areas (in contrast to only 25.8% Canada-wide), and both Newfoundland & Labrador and Nova Scotia had greater numbers of charities in rural than urban areas for most of the study period. Atlantic Canada was also home to more than its share of charities over the period based on population, with

such only 6.5% of the Canadian population in 2022 but 9.7% of total charities on annual average 2006-2020 (Le et al., 2024)³. Gibson & Barrett (2018) and others have also noted that over 40% of all community foundations are based in rural areas, despite being home to less than 20% of the population (Gibson et al., 2014; Gibson & Barrett, 2018).



A noted strength of rural philanthropy is the ability to capitalize on residents' often strong sense of place (Lorinc, 2019).



In Quebec, CRA data filed for the 2019-2021 period showed that 14% of charities were located in rural areas, and that only 5% of all charities' donations of \$2,500 or more were granted to organizations located in rural areas, despite the population representing 29% of provincial total (Longtin, 2022). Unsurprisingly, people living in rural areas have close access to fewer charities and receive less attention from the existing ones, mainly those based in urban areas. The data reveal that of all donations in support of rural causes, 49.3% are from urban charities and 50.7% from rural charities. Moreover, funding from public foundations, particularly community foundations and Centraide, make up the majority (79.4%) of these donations (Croteau, 2023). Although they play an important role in supporting rural causes, there are only 10 community foundations in Quebec, representing 5% of all Canadian community foundations (Longtin, 2022).

A noted strength of rural philanthropy is the ability to capitalize on residents' often strong sense of place (Lorinc, 2019). This translates into a higher tendency by rural than urban Canadians to donate to charitable organizations (Squires, 2022). Barrett & Gibson (2013) provide the example of Atlantic Canada, where

residents are among the top givers (in terms of both cash and volunteering) in Canada. Devlin & Zhao (2017) further demonstrate that rural residents give more compared to urban ones in Quebec. This sense of place may also bolster the role of non-profit and charitable organizations, and of volunteers in care work in rural regions. Reid (2019) and Remes (2016) discuss, for example, how residents and organizations in Atlantic Canada stepped up to help others in disaster situations such as in the aftermath of the 9/11 terrorist attacks by providing food, shelter, communications, and emotional support to passengers from around the world in Gander, NL, or by providing shelter and other forms of relief following the 1917 Halifax explosion. Holland (2022) discusses the role of churches, family members, and non-profit and volunteer organizations caring for individuals outside of the formal health system in rural New Brunswick by providing food, information, transportation, and other supports, while Cameron et al. (2022) described similar supports provided for resettled Syrian refugee women by small volunteer organizations, although also noting a lack of formal, regular, culturally relevant supports for refugee women in Nova Scotia.

Despite these strengths and encouraging signs, philanthropic organizations in rural Canada face a host of challenges. Charities in rural Canada tend to be smaller, with lower endowments and average annual revenues (for the period 2006-2020) than their urban counterparts for example. Charities in urban Canada earned an annual average revenue of \$221.63B/year Canada-wide over 2006-2020, while rural charities only received an annual average of \$14.53B/year. Average annual revenue earned per charity was \$3.54M in urban regions but only vs. \$670K in rural regions. Demonstrating regional differences as well, the average annual revenue in Atlantic was \$2.52M/charity in urban regions and \$470K/charity in rural regions (Le et al., 2024)⁴.

As the Nova Scotia refugee story suggests, concerns have been expressed about government downloading and the limited capacity of rural organizations and volunteers to fill in where other services do not exist despite funding cuts (Levesque, 2020; Lorinc, 2019). Kay & Ramos (2017) and Myers & MacDonald (2014) raise concern about co-optation by governments and uneven power relations associated with funding and dependency relationships, requiring alignment of civil society organizations with governments agendas and investment of time and resources to meet bureaucratic requirements. Changing policies between successive governments leave much room for uncertainty in the

realization and sustainability of rural development initiatives, which very often depend on government funding (Moralli, 2022). Quebec stood out for its National Rural Policy from 2001 to 2014, a bottom-up policy that recognized the capacity for action of local governments and represented a new approach, with a focus on decentralized rural development (Joyal & El Batal, 2007). It marked a strategic change on the part of the provincial government and a paradigm shift in the representation of rurality to support local players in decision-making processes (Joyal et al., 2005). In 2014, the abolition of the National Rural Policy in a period of austerity gave way to a universalizing approach to economic development that placed little importance on rurality. This new political environment has encouraged the emergence of alternatives in terms of social and environmental justice (Jean, 2012; Alberio & Klein, 2002), and philanthropy has the potential to support innovation where public policies do not offer the required flexibility (Ivany, 2021; Lorinc, 2019).



The challenge for rural charities is to gain recognition for their specific characteristics, and therefore of their communities (Croteau, 2023).



Gibson et al. (2014) posit that philanthropy could play an important role in diversifying funding for regional development. However, it is important to remain vigilant against governmental disempowerment of rural communities (Doyon et al., 2000). Philanthropy must be presented as a support mechanism for rural community revitalization (Lorinc, 2019) and not a replacement for public policy and public funding (Gibson et al., 2013). By supporting services

and programs that were previously the State's responsibility, charities become complicit in the strategy of government downloading. Nevertheless, by identifying and disseminating the most promising models, philanthropy can encourage a better understanding of their impacts (Gibson et al., 2014). Philanthropy should then be encouraged to defend rural interests, ensuring that rural perspectives are properly considered when it comes to establishing policies for distributing the regional funds needed to work towards the sustainable revitalization of rural areas (Ivany, 2021).

In Quebec, a mutual misunderstanding between philanthropy and territorial development in rural areas may lead to ties between the two remaining weak (Croteau, 2013). On one hand, local rural actors are not inclined to turn to charities when seeking funding. On the other hand, many charities work mainly in urban areas and are distant from rural realities (Carlson & Cook, 2021). Gibson et al. (2014) suggest that if philanthropy is to remain local, new philanthropic actors on a rural scale have to emerge.

Rural charities experience an isolation effect within the philanthropic sector that has served as a barrier to rural philanthropy. This applies both to the State, which has limited knowledge of the sector, and to civil society organizations, which are often rooted in a metropolitan culture. Bridging the urban-rural divide poses a number of challenges (Lorinc, 2019). The challenge for rural charities is to gain recognition for their specific characteristics, and therefore of their communities (Croteau, 2023). For urban charities, this will require demonstrating flexibility and adaptability to rural realities, since local rural players may adopt different approaches and postures from the urban donors and beneficiaries with whom urban charities often collaborate (Gibson et al., 2013). Shared learning is possible when charities base funding strategies for rural projects on relationships of proximity and dialogue. It is therefore important to establish these relationships based on the «rural factor», including an openness to the specific nature of community needs, problems, issues, and aspirations of on-the-ground realities (local or regional), to ensure that the framework for collaboration is established on respectful grounds (Croteau, 2023).

Conclusion/future directions re. future research

Moving forward, building a strong data infrastructure on the country's rural philanthropic ecosystem would help inform decisions on how to meet the needs of each community (Ryser & Halseth, 2014). Non-profit

organizations, foundations, and researchers could benefit from data collected from rural local community members and organizations, which could improve understanding of the different trends emerging in various communities. This could potentially increase community resiliency in the face of new challenges posed by climate change and social injustices. Better modes of sharing information on what resources are available for regional development, including philanthropic contributions, is an important area to explore.

An increase in social networking and synergies among local communities and charitable organizations is equally significant and related to the need for information sharing. There is also a need to have a space where innovations taking place in rural philanthropy across Canada can easily be shared. Furthermore, increasing attention to the significant role that rural community foundations can play in investing and shaping the wellbeing of Canada's rural and remote regions could attract new donors, both from within these areas and from further afield, which may be a means of bridging Canada's urban-rural divide (Lorinc, 2019).

Another area to explore in helping rural philanthropy is the forging connections between traditional philanthropy and commercial or quasi-commercial activity (Lorinc, 2019; Ryser & Halseth, 2014). There is also evidence that community foundations are directly engaged in local economic development initiatives, an opportunity to creatively make investments geared to the changing nature of rural areas (Gilothe, 2019; Lorinc, 2019). Finally, looking at co-ops, which hold a philanthropic component, and how they can help and support each other also holds promise.

Notes

1 Here, "urban" refers to census metropolitan areas (CMAs) and census agglomeration (CAs), which are commuting areas with core populations of at least 100,000 or 10,000, respectively. "Rural" refers to all areas that are outside of CMAs and CAs (Statistics Canada, 2022b). In this study, charities were classified as urban or rural based on their reported address using the Postal Code Conversion File, which links Postal Codes to CMAs and CAs (Statistics Canada, 2011).

2 Calculated using data provided by the Canada Revenue Agency (2022) and Statistics Canada (2011).

3 Calculated using data provided by the Canada Revenue Agency (2022) and Statistics Canada (2022b; 2011).



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ÉTUDES DE CAS | CASE STUDIES

Les professionnel·le·s de la philanthropie au Québec : exploration des métiers et des compétences au service du secteur

Par **Caroline Bergeron**, Responsable de programmes de premier cycle à la Faculté de l'éducation permanente de l'UdeM; **Diane Alalouf-Hall**, Directrice du PhiLab Québec; **David Grant-Poitras**, Candidat au doctorat en sociologie à l'UQAM et coordonnateur du PhiLab-Québec



Caroline Bergeron est responsable de programmes de premier cycle à la Faculté de l'éducation permanente de l'Université de Montréal. Formée en gestion, en communication et en muséologie, elle enseigne la gestion philanthropique. Elle a travaillé en RSE chez Bell Canada, au développement de Bibliothèque et archives nationales du Québec ainsi qu'à plusieurs titres à l'Université de Montréal.

Diane Alalouf-Hall, docteure en sociologie, dirige le PhiLab Québec, tout en étant chercheure postdoctorale à l'université de Colombie-Britannique (UBC) dans le projet : The Seniors Philanthropy Gap: Examining Social Justice Philanthropy's Neglect of Age and Aging. Elle termine actuellement une recherche au sein de la fondation de la Croix-Rouge française, où elle se consacre à l'étude des pratiques d'internationalisation de la gouvernance d'ONG humanitaires et ses impacts sur les politiques de renforcement économiques des femmes.

David Grant-Poitras est candidat au doctorat en sociologie à l'Université du Québec à Montréal. Il réalise une thèse par articles dans le cadre de laquelle il s'intéresse au positionnement des fondations philanthropiques dans la transition socio-écologique. David agit également comme chercheur et coordonnateur au sein du PhiLab-Québec.

Introduction

La philanthropie occupe une position de plus en plus prééminente dans nos sociétés, jouant un rôle crucial dans le financement de projets culturels, éducatifs, sociaux et religieux (Fontan et al. 2011 ; Norris-Tirrell et al., 2018). Malgré leur longue feuille de route, les métiers soutenant la philanthropie demeurent souvent méconnus, se limitant généralement aux compétences spécifiquement liées à la collecte de fonds. Bien que le grand public associe habituellement la philanthropie à deux groupes distincts – les philanthropes fortunés et

les bénévoles – la réalité est plus complexe et variée.

Dans l'objectif de lever le voile sur cette diversité et de mettre en avant les compétences, les expertises et les savoir-faire des professionnel·le·s de la philanthropie subventionnaire, cette étude, conduite par une équipe de PhiLab Québec, se concentre sur celles et ceux qui travaillent au développement philanthropique et à la collecte de fonds au sein d'organismes à but non lucratif ou d'organismes de bienfaisance. Notre recherche répond à deux questions. Quels sont les parcours professionnels.es de la philanthropie. Quels sont les enjeux auxquels ces personnes sont confrontées dans leur pratique ?

En d'autres termes, cette étude explore à la fois les trajectoires professionnelles des individus engagés dans des organisations philanthropiques et les défis auxquels ils ou elles font face. Nous partons de l'hypothèse que les professionnel·le·s de la philanthropie sont motivé·e·s par un engagement envers diverses causes sociales et par le désir de créer un impact positif dans la société. Nous anticipons également que ces individus sont confrontés à des défis liés à la gestion des ressources financières, à la coordination des parties prenantes et à la conciliation entre les objectifs philanthropiques et les réalités pratiques. En explorant les motivations, les défis et les satisfactions des professionnel·le·s de la philanthropie, notre recherche contribue à une compréhension de leurs parcours de carrière de ces professionnels et à leurs rôles dans la réalisation des objectifs philanthropiques.

1.0 Repères théoriques : les motivations professionnelles dans le secteur de bienfaisance

Ces dernières années, l'intérêt pour les motivations professionnelles dans les domaines des services publics mais aussi de la bienfaisance et de l'humanitaire a connu une augmentation notable de la part des milieux de la recherche. En témoigne une diversité d'études menées par des chercheur·e·s tels Perry et Wise (1990), Kunreuther et al. (2006), Skeoch et al. (2017), Komenská (2017), Breeze (2017) et Breeze et Wiepking (2020).

Perry et Wise (1990) ont posé les bases théoriques en définissant la « motivation au service public » (MSP) et en identifiant diverses motivations présentes chez les professionnel·le·s du secteur à but non lucratif. Ils ont mis en lumière des motivations rationnelles, liées aux politiques publiques, ainsi que des motivations normatives, telles que l'engagement envers l'intérêt public, le sens du devoir civique, et le désir de justice

sociale. Ces motivations, qu'elles soient rationnelles, normatives, ou affectives (comme la compassion), influent sur le choix d'entrer et de rester dans le secteur non lucratif.

Kunreuther (2006) a exploré les différences générationnelles dans les motivations et les trajectoires professionnelles, soulignant les variations entre les dirigeant·e·s plus âgé·e·s, motivé·e·s par le désir de « changer le monde », et les jeunes à la direction, guidés par leurs expériences personnelles et leur volonté d'aider des communautés spécifiques, souvent en lien avec des enjeux de justice sociale.

Plus récemment, Komenská (2017) a examiné le secteur humanitaire, mettant l'accent sur le travail sur le terrain sous forme de volontariat et soulignant les considérations éthiques et les valeurs morales qui le sous-tendent. Plus proche de notre milieu d'intérêt, dans la toute première étude empirique portant sur les identités, les caractéristiques et les motivations des professionnel·le·s de la collecte de fonds, Breeze (2017) conclut qu'il est nécessaire, pour comprendre le phénomène du don dans nos collectivités, d'étudier les rôles que jouent celles et ceux qui en sont la courroie de transmission.

2.0 Méthodologie

Notre étude visait à documenter les parcours professionnels dans le domaine de la philanthropie. Plusieurs méthodes de collecte de données ont été employées pour y arriver :

- **Entrevues en ligne (2019).** Un total de 42 répondants.es, comprenant des professionnels.es d'OBNL ou OBE (dirigeants.es, directeurs.trices, fondateurs.trices), des consultants.es en philanthropie, des acteurs.trices de l'éducation et de la recherche académique, ainsi que des membres d'associations professionnelles, ont fourni des informations détaillées sur leurs parcours professionnels, expériences et perspectives en matière de leadership philanthropique.
- **Sondage en ligne (2019).** Un total de 107 répondants.tes, oeuvrant en gestion philanthropique, ont répondu à un sondage visant à mieux connaître leur situation professionnelle. Ces répondants.tes ont été recrutés.ées auprès du Certificat en gestion philanthropique de l'UdeM, et ce, par le biais du bulletin électronique de l'Association des professionnels en gestion philanthropique (APGP), de la page Facebook du Certificat en gestion philanthropique ainsi que par un appel ciblé sur LinkedIn. Les résultats ont

été colligés entre le 8 janvier et le 5 mars 2019 et présentés au congrès de l'APGP de mai 2019.

- **Collecte de données sur les diplômés du Certificat en gestion philanthropique (UdeM).** Les cohortes couvrant la période de 2018 à 2022 ont été observées pour identifier les tendances en matière de formation et les compétences recherchées dans le secteur.
- **Entrevues post-pandémie (2022).** Une série d'entrevues semi-dirigées a été menée auprès d'une dizaine de professionnels.es de la philanthropie pour explorer les impacts de la pandémie de la COVID-19 sur le secteur, en recueillant des informations sur les défis rencontrés et les opportunités émergentes.
- **Analyse de profils LinkedIn (dirigeants.es d'OBE) de 2021 à 2023.** Une analyse des profils *LinkedIn* de dirigeants.es de dix OBE établies, fournissant des services principalement dans le domaine de la santé et de l'aide sociale au Québec, a été réalisée. Cette approche a permis de recueillir des données sur les parcours académiques, les expériences professionnelles antérieures et les compétences des dirigeants.

3.0 Présentation des résultats autour de thématiques centrales

Les résultats de la collecte de données mettent en évidence plusieurs aspects clés des parcours professionnels dans la philanthropie. Les motivations les plus courantes incluent le désir d'avoir un impact social significatif, la passion pour une cause spécifique et la satisfaction de contribuer à la réalisation d'objectifs philanthropiques. Les participant.e-s ont également souligné les défis liés à la gestion des ressources financières, à la coordination des parties prenantes et à la nécessité de trouver un équilibre entre les objectifs philanthropiques et les contraintes pratiques.

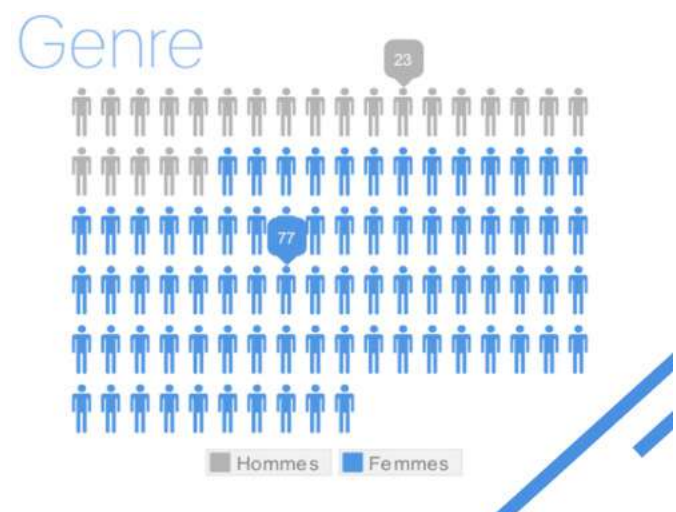
3.1 Les métiers du secteur philanthropique au Québec

Au Québec, le secteur philanthropique est en pleine expansion. Il mobilise une diversité de compétences et d'expertises qui permettent une variété de carrières. Selon Statistique Canada, le nombre d'organismes à but non lucratif (OBNL) au Québec a connu une croissance significative de 20% entre 2010 et 2020, illustrant le dynamisme de ce secteur.

Dans le contexte québécois, le secteur philanthropique offre une variété de métiers visant à promouvoir des causes sociales, culturelles, éducatives et

environnementales. Parmi les compétences les plus courantes relevées, on trouve celles liées à la direction d'organismes philanthropiques, celles associées à la collecte de fonds et à la gestion des relations avec les donateurs.trices. Les personnes en charge de la collecte de fonds sollicitent les dons des individus, des entreprises ou des fondations en vue de financer la mission de l'organisation ou des projets spécifiques de celle-ci. Les responsables des relations avec les donateurs et donatrices établissent et entretiennent des liens durables avec eux et elles. Les coordonnateurs.trices de bénévoles organisent et supervisent les personnes qui participent aux activités philanthropiques. Des analystes de subventions évaluent les demandes de financement, tandis que des conseillers et conseillères en philanthropie fournissent des conseils stratégiques. Les chargés et chargées de communication philanthropique créent des stratégies pour promouvoir les initiatives, et les responsables de programme philanthropique gèrent et mettent en œuvre des projets spécifiques. La gestion de fonds philanthropiques est assurée par des gestionnaires spécialisés, et des évaluateurs et évaluatrices d'impact social analysent l'efficacité des initiatives philanthropiques. Ces métiers, présents au sein d'organisations à but non lucratif, de fondations et d'organismes de bienfaisance, sont indispensables au bon fonctionnement des organisations philanthropiques québécoises. À la suite des échanges avec des répondant.e-s, il nous a été indiqué que l'activité « conseil en matière philanthropique » est un domaine en plein essor au Québec.

3.2 Le profil des professionnel-le-s actifs.ves en gestion philanthropique



Le groupe des personnes occupant un poste en gestion philanthropique comprend une majorité de femmes

(77%). Bien que la moitié (51%) des travailleurs.euses dans ce secteur aient plus de 45 ans, la cohorte la plus importante des professionnel-le-s a entre 35 et 44 ans (36%). C'est également chez les plus de 45 ans qu'on trouve près des 2/3 des hommes, ce qui laisse à penser que le secteur se féminise et le fera d'avantage au cours des années à venir. Les travailleurs.euses du domaine de la philanthropie détiennent un diplôme universitaire à 82% avec une nette prédominance pour celui de 2e cycle (43%).

Au quotidien, les professionnel-le-s de la gestion philanthropique sont attachés (89%) à leur travail, légèrement plus qu'ils en sont satisfaits (79%). Celles et ceux qui se ne sont pas satisfaits quittent le milieu dès la 3e année d'expérience. Malgré leur diplomation élevée, le groupe des professionnel-le-s en gestion philanthropique estime que la formation dans le domaine est insuffisante (65%). Les compétences qui leur manquent relèvent de la gestion (35%) et des communications (43%). En gestion, il se les expriment leurs principales carences du côté de la direction des organismes, le leadership, la gouvernance et la gestion des risques. Du côté des communications, ce sont les relations avec les différentes parties prenantes que les professionnel-le-s souhaiteraient mieux maîtriser, de même que l'innovation et la créativité dans le cadre des changements.

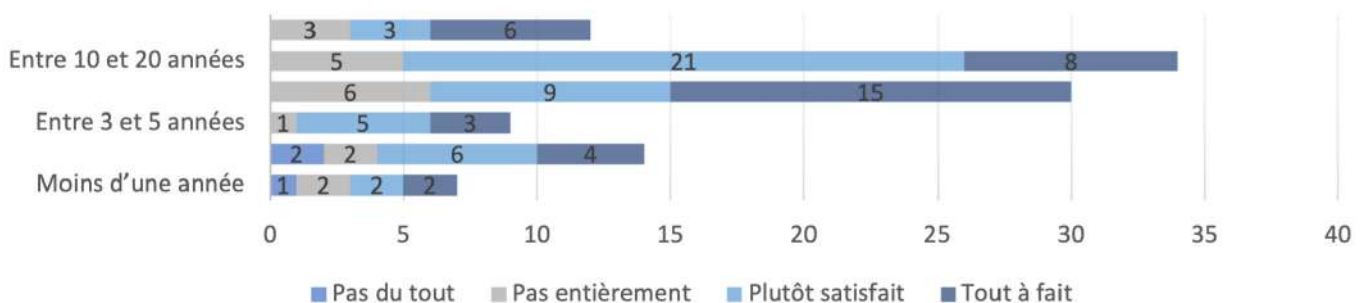
3.3.1 L'engagement envers les valeurs et les causes personnelles

Les entretiens ont révélé que l'engagement envers les valeurs et les causes personnelles est une motivation essentielle pour les personnes actives dans la philanthropie. Les répondant-e-s ont exprimé leur désir d'avoir un travail qui correspond à leurs valeurs et qui soit utile pour autrui. Ils sont animés par le souhait de contribuer à la construction d'un monde reflétant leurs idéaux. Plusieurs répondant-e-s ont souligné leurs intérêts particuliers pour des sujets précis tels que l'environnement, le développement durable et l'égalité femme-homme. En faisant des parallèles avec leur propres vies, l'éducation qu'ils ont reçue et les valeurs qu'ils souhaitent transmettre à leurs enfants.

« Mon engagement professionnel est profondément enraciné dans la conviction que chaque action individuelle compte dans la construction d'un monde plus juste et respectueux de l'environnement ». (Entrevue 004, 2019)

« Chacune de mes décisions professionnelles découle d'une passion profonde visant à œuvrer pour des idéaux de justice sociale et environnementale. C'est cette motivation qui confère une signification à l'évolution de ma carrière ». (Entrevue 009, 2019)

NIVEAU D'ATTACHEMENT ENVERS LA PROFESSION EN FONCTION DES ANNÉES D'EXPÉRIENCE (SONDAGE AGRP)



3.3 Motivations des acteurs de la philanthropie

Les motivations qui animent les professionnel-le-s de la philanthropie sont déterminantes dans le choix de leurs occupation professionnelles. Les facteurs clés qui les incitent à s'engager dans ce domaine sont liés à l'impact social souhaité. Ils et elles sont guidés par leur passion pour une cause spécifique et par un sentiment de responsabilité envers la communauté.

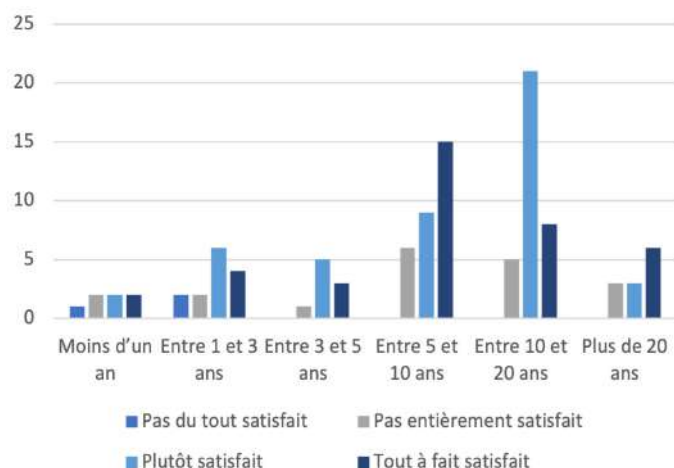
C'est le cas notamment dans le témoignage d'une personne qui a baigné dans le bénévolat auprès de sa communauté dès son jeune âge, et qui a naturellement transposé cette pratique dans sa vie professionnelle pour venir en aide aux personnes en situation de handicap. Dans ces entretiens, les objectifs de carrière sont étroitement liés avec le désir de jouer un rôle actif dans la réalisation de certains idéaux de justice sociale.

et environnementale. Cette personne est motivée par la conviction que son travail doit être en harmonie avec ses valeurs profondes et qu'il peut apporter une contribution significative à la société.

3.3.2 Le sentiment de responsabilité envers la communauté

Au cœur des récits recueillis nous trouvons un fort sentiment de responsabilité envers la communauté. Pour elles et eux, contribuer à l'amélioration de la société et soutenir ceux et celles qui en ont besoin est une conviction profonde. Comme l'a partagé l'un.e des participants.es, « *En tant qu'individu privilégié de la société, je ressens une responsabilité particulière envers les personnes moins fortunées ou marginalisées* » (Entrevue 007, 2019). Cette responsabilité perçue motive leur participation proactive dans des projets philanthropiques, où ils ou elles cherchent à créer un impact positif et durable. Comme le souligne également cet autre témoignage, « *En m'impliquant dans ce secteur d'activité, j'ai le sentiment d'offrir un soutien réel et en contribuant à résoudre des problèmes sociaux* » (Entrevue 002, 2019). Il devient évident que pour ces individus engagés, la philanthropie n'est pas seulement un acte de bienveillance, mais une réponse active à la responsabilité qu'ils ou elles ressentent envers la communauté. Cette dynamique révèle un puissant moteur d'action, où le sentiment de responsabilité guide chaque individu à mobiliser ses ressources et compétences pour générer un impact positif significatif.

Niveau de satisfaction au travail des professionnels selon les années d'expérience (sondage APGP)



4.0 Défis rencontrés par les professionnel-le-s de la philanthropie

Les professionnel.le.s de la philanthropie font face à une série de défis dans leur quotidien. Ceux et celles que nous allons citer font écho aux compétences qu'ils et elles désirent acquérir pour la suite de leur parcours professionnel. Il y a un désir d'agir de façon plus efficace afin de bien répondre au fait que l'environnement philanthropique est en constante évolution et parce que ces personnes doivent agir stratégiquement au plan des communications.

4.1 Gestion : Des ressources financières limitées ou « comment faire beaucoup avec peu »

Le sondage nous a révélé que les professionnels.les de la philanthropie, même après plusieurs années d'expérience, sont nombreux (43%) à penser qu'ils ou elles auraient besoin de formation en gestion; 65% estiment que la formation actuelle est insuffisante¹. La gouvernance, la gestion des risques ainsi que le leadership à la direction des OBNL sont des thématiques qui reviennent. Le défi de gérer des ressources financières limitées est fréquemment cité par les professionnel-le-s de la philanthropie, phénomène accentué par la crise sanitaire de la COVID-19. Dans cette lutte constante pour maximiser l'impact, les témoignages mettent en lumière des stratégies perspicaces. Certain.e.s privilégient une « évaluation rigoureuse des projets prioritaires » pour concentrer les ressources là où elles auront le plus grand potentiel de changement, comme le souligne un participant : « *Nous avons dû être sélectifs, en nous concentrant sur les initiatives avec le plus fort impact potentiel* » (Entrevue 045, 2022). D'autres adoptent une approche collaborative en développant des partenariats stratégiques pour optimiser les ressources. Un professionnel a partagé son expérience : « *Le partenariat et plus largement les initiatives de collaboration nous ont permis de combiner nos forces et de créer un impact plus important ensemble* » (Entrevue 44, 2022). L'exploration d'approches innovantes est également mise de l'avant, notamment le recours au financement participatif : « *le financement participatif nous a ouvert de nouvelles portes en engageant directement la communauté dans nos projets* » (Entrevue 011, 2019).

4.2 Coordination délicate avec les parties prenantes: harmoniser des intérêts divergents

La philanthropie nécessite implique des modalités de coordination avec diverses parties prenantes telles que les bénéficiaires, les donateurs.trices, les

gouvernements, les ONG, les entreprises, et d'autres acteurs clés. Cette coordination complexe représente des défis, car les intérêts, priorités, et attentes des différentes parties prenantes peuvent diverger, renforçant ainsi les incertitudes liées aux stratégies de partenariat et de collaboration.

Le sondage effectué révèle que le tiers des professionnel.le.s estiment (35%) que des formations en communication sur les relations publiques, sur les relations avec les donateurs seraient utiles. Les thèmes de l'innovation, de la créativité et du changement sont également cités, de même que les stratégies soutenant les stratégies pour les dons majeurs et les dons planifiés.

Les témoignages soulignent des défis tels que la compétition, l'évolution des technologies, et les préoccupations liées à l'image et à la responsabilité, nécessitant ainsi une recherche continue de solutions innovantes pour consolider les opérations de collecte de fonds et optimiser la gestion financière. La coordination avec les parties prenantes demeure cruciale pour le succès des initiatives philanthropiques.



La visibilité accrue des activités philanthropiques a intensifié la responsabilité et la demande de transparence, générant des pressions supplémentaires sur les professionnel.le.s de la philanthropie qui insistent sur l'importance d'une conduite irréprochable, induisant du stress au quotidien.



Il est primordial de développer une compréhension approfondie, d'une part, des dynamiques de campagnes de financement, et, d'autre part, de l'écosystème philanthropique. L'importance des groupes de réflexion et études menées par des centres de recherche universitaires est soulignée comme une source d'inspiration effective pour acquérir une connaissance scientifique approfondie du secteur. Les échanges avec des universitaires donnent accès à des analyses plus approfondies que celles présentes dans les réseaux sociaux. Ils contribuent à l'amélioration des pratiques et à renforcer l'impact de la philanthropie. Les témoignages mettent en évidence que l'approche collaborative n'est pas innée. Les compétences se développent sur le terrain, elles exigent des savoirs faire en gestion des relations, en négociation, et en diplomatie, ainsi que l'application de principes tels la transparence, l'écoute active, et la prise en compte des perspectives de toutes les parties prenantes à toutes les étapes d'un projet philanthropique.

4.3 Pressions externes et attentes du public: maintenir une réputation exemplaire

Les professionnels.es de la philanthropie font souvent face à des pressions externes, notamment les attentes du public, les critiques médiatiques ou de la société civile ainsi que les exigences réglementaires en constante évolution. La visibilité accrue des activités philanthropiques a intensifié la responsabilité et la demande de transparence, générant des pressions supplémentaires sur les professionnel.le.s de la philanthropie qui insistent sur l'importance d'une conduite irréprochable, induisant du stress au quotidien. Dans le public, on entend même remettre en question le salaire, suggérant « *vous devriez faire cela gratuitement. On en est encore là pour certains!* » (Entrevue 015, 2019).

Pour faire face à ces pressions, les professionnel.le.s de la philanthropie adoptent des approches solides en matière de gouvernance, renforcent la transparence et la responsabilité envers les parties prenantes, et communiquent largement sur leurs objectifs, réalisations, et les défis rencontrés. Ils et elles cherchent également à engager un dialogue constructif avec le public et la société civile pour mieux comprendre leurs attentes et intégrer leurs perspectives dans leurs pratiques philanthropiques. Cependant, atteindre ces idéaux reste difficile en raison des ressources limitées dans certaines organisations et de la compétition qui en découle. Parmi les outils ou les moyens souhaités, plusieurs professionnel.le.s du domaine soulignent que l'établissement d'une communauté de pratiques

(27%) ou un centre de ressources et d'études de cas (27% aussi), plus encore que l'établissement d'un ordre professionnel (3%) pourraient les soutenir.

5.0 Conclusion

La recherche met en évidence la nécessité de soutenir le développement professionnel des acteurs de la philanthropie afin d'accroître leur efficacité et leur résilience. Cette notion résonne avec les travaux sur la philanthropie au Canada, reconnaissant que les individus évoluant dans le secteur caritatif requièrent un soutien adapté pour atteindre leur plein potentiel. Ceci est également en accord avec les conditions essentielles de succès pour instaurer une philanthropie durable, telles qu'étudiées par Wiepking et Handy (2015).

Malgré les motivations intrinsèques des acteurs, liées à leurs valeurs personnelles et à leur désir de créer un impact positif, l'efficacité et la résilience ne sont pas toujours garanties en raison de défis plus complexes. Ainsi, le renforcement du développement professionnel des acteurs de la philanthropie peut être accompli par le biais de formations spécialisées, de mentorats et de réseaux professionnels, soulignant particulièrement l'importance de la reconnaissance de leur contribution. Cette étude met en lumière le rôle crucial des parcours professionnels dans la philanthropie et souligne les défis auxquels sont confrontés les professionnels engagés dans ce domaine. Une compréhension approfondie de ces enjeux contribuera à mieux soutenir les acteurs de la philanthropie dans leurs efforts pour générer un impact social positif et promouvoir le bien-être communautaire.

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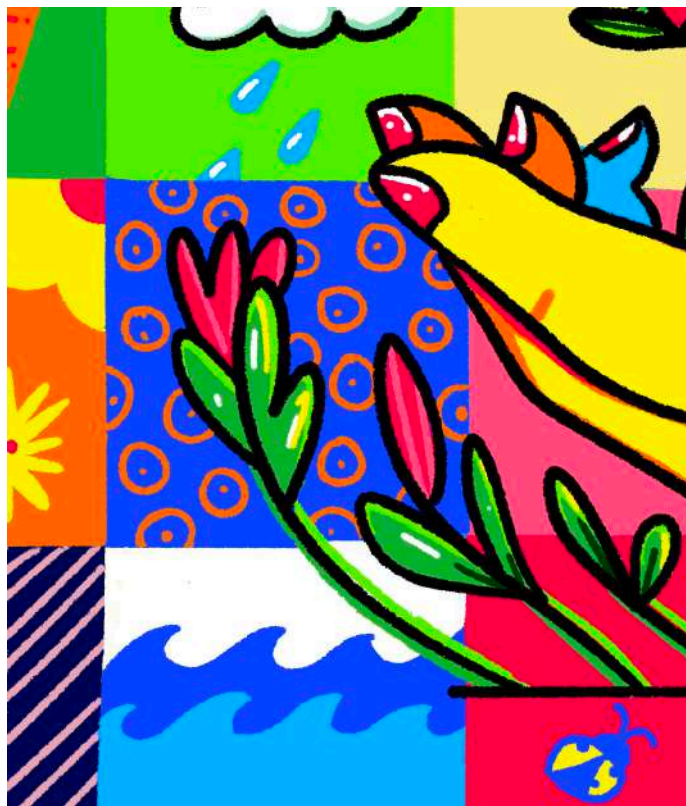
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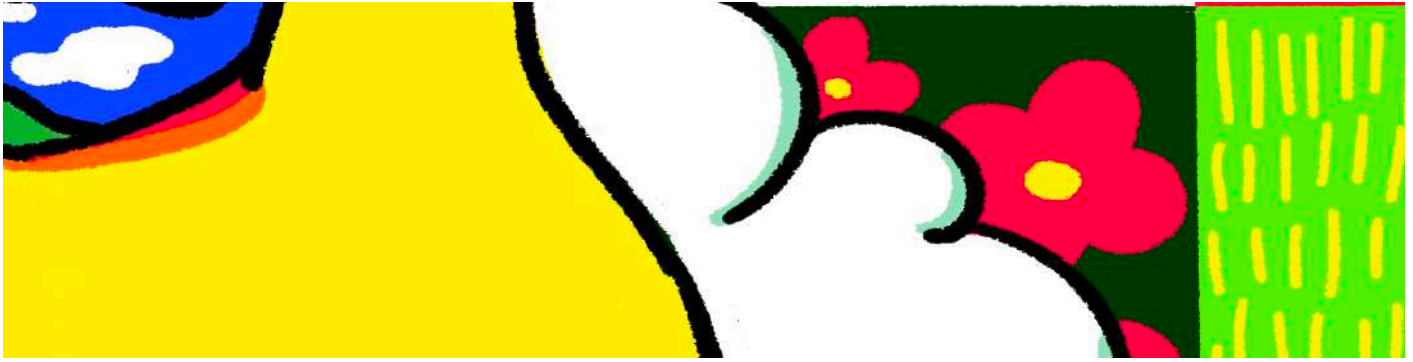
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Pour aller plus loin :

Consulter la base de données suivante disponible sur le site du PhiLab : [Les métiers de la philanthropie, Aperçu du secteur en 42 portraits \(2019\), ISBN: 978-2-9818051-0-2.](#)





ÉTUDES DE CAS | CASE STUDIES

Reflection on my Partnership Research with the Rural Communities Foundation of Nova Scotia (RCFNS)

By Edmund Yirenkyi, PhD Student Memorial University Grenfell Campus; Penny Day, Executive Director, Rural Communities Foundation of Nova Scotia



Edmund Yirenkyi, a dedicated PhD Student in the Transdisciplinary Sustainability program at the Grenfell Campus of Memorial University, delves into the intersections of religion and theology, global development and social justice, resource economics and sustainable development, and International Relations. His PhD research on "The role philanthropy plays in financing climate change mitigation and adaptation" reflects his commitment to community well-being. Driven by a passion for knowledge, he explores the transformative potential of nonprofits in fostering thriving communities.

Penny Day calls rural Halifax home, where she's been an active community member for years. She's served as Executive Director of the Rural Communities Foundation of Nova Scotia since 2021, previously as a board member starting in 2018. With experience spanning various rural communities and groups, Penny understands the importance of local connections and communication for strong communities. Bringing a blend of business, communications, and strategic skills to her role, she holds a BA in Economics from Memorial

University of Newfoundland and has worked in both private and public sectors across multiple countries.

The partnership between the Atlantic PhiLab Hub and the [Rural Communities Foundation of Nova Scotia \(RCFNS\)](#) is an example of collaboration dedicated to community development and philanthropy. RCFNS, a charitable organization and community foundation, has supported rural Nova Scotia's community organizations for over two decades through various means, such as bringing people together, providing grants, and building organizational capacity. RCFNS is widely respected for its excellence and leadership in rural grant-making. It strongly focuses on aligning its efforts with important frameworks like the [United Nations Sustainable Development Goals](#), the [Canadian Philanthropic Commitment to Climate Change](#), and [Nova Scotia's Social Determinants of Health](#).

The collaboration between PhiLab and RCFNS started in the early days of PhiLab and from the beginning of the Atlantic Hub's formation. The Hub began with a meeting in March 2019 to come up with ideas and questions that researchers and community partners had in relation to the operation and function of

the Atlantic Hub. Former RCFNS Chair Arthur Bull and Vice Chair Maureen Coady participated in the session as founding community partners. Brady Reid, Ph.D. student and former Atlantic Hub coordinator for PhiLab, also conducted an interview with Arthur later in 2019 that profiled RCFNS on the PhiLab blog and website. These initial interactions laid the foundation for further collaboration. Despite pandemic disruptions, the collaboration continued, with RCFNS participating in the 2021 [PhiLab Atlantic Hub & RCFNS Atlantic Canadian Conference](#) titled “Philanthropy and Community Investment.” Building on this connection, Brady provided valuable research assistance to the RCFNS for the Canada Healthy Communities Initiative. This research directly informed the RCFNS’s funding allocation decisions, highlighting the essential role of the hub in supporting its partners and fostering regional connections.

In April 2022, Sarah Lavallée, a student at the Department of Community Development at Acadia University, served as an intern on a student placement program to collaborate with RCFNS to support and assess the goal of understanding, communicating, and strengthen the impact of rural philanthropy in NS communities from a holistic community well-being perspective. Sarah’s partnership with RCFNS produced a report titled “[Thriving in a Time of Uncertainty: Grant Impact Report Rural Communities Foundation of Nova Scotia](#).” This report aimed to delve deeper into the impacts of RCFNS grants on rural communities across Nova Scotia. Through eight impact interviews with past and current grant recipients, significant short-term and long-term impacts of the grants were revealed on both the recipients and the wider community. The report highlighted the role of RCFNS grants in addressing disparities between rural and urban regions, particularly for marginalized populations. Seven key themes emerged from the interviews, including the importance of place-based projects, leveraging funding from other organizations, amplifying marginalized voices, and the mutual aid model’s strength in rural communities. While expressing gratitude for the support received, grant recipients also highlighted challenges such as minimal resources leading to burnout and decreased capacity within organizations. Insights provided by grant recipients suggested potential areas for further support from RCFNS, including facilitating fund leveraging and enhancing knowledge sharing among grant recipients. Sarah’s report stressed that RCFNS goes beyond simply awarding grants. Their funding serves as a crucial tool for fostering sustainable

practices within communities, with a particular focus on empowering marginalized groups. These insights from the report contribute to understanding the effectiveness and potential areas for improvement in RCFNS’s grant-making initiatives, connecting directly to the collaborative work between PhiLab and RCFNS.



The evolving partnership between the Atlantic Hub of PhiLab and RCFNS demonstrates the power of collaboration and shared goals in research, community development, and philanthropy. Through joint projects, research endeavors, and the fostering of connections, both organizations have achieved their immediate objectives and strengthened their commitment to positively impacting Nova Scotia’s rural communities. This partnership sets an example for future collaborations that we in the Atlantic Hub want to replicate.



Building upon the successful collaboration through the grant impact report, I sought to deepen this partnership through my Ph.D. research, which focuses

on the role of philanthropy in financing climate change mitigation and adaptation. When I began my PhD, I was looking for a strong organizational partner. I connected with Brady Reid, former coordinator of the PhiLab Atlantic Hub. He suggested I join him at the [“Community Impact Conference on Climate Commitments in Action,”](#) held on April 22, 2023, at the Eltuek Arts Centre, Gallery 211 in Sydney, Nova Scotia. This conference, organized by the Rural Communities Foundation of Nova Scotia, provided an ideal networking and partnership development platform.

At the Community Impact Conference, Brady and I presented on “Partnership in Philanthropic Action.” We discovered alignment between my research goals and the goals of RCFNS, making the foundation an ideal research partner. Following the conference, I sought to solidify further the collaboration at the [“Reconnect - Community Foundations Conference 2023.”](#) This event, organized by the Community Foundation of Canada to convene community foundations nationwide, provided an avenue for me to meet with board members of RCFNS to strengthen our relationship.

The pivotal moment in this partnership was the acceptance of an internship proposal by Penny Day, the Executive Director of RCFNS. Recognizing the potential benefits of a deeper collaboration, RCFNS welcomed me as an intern. This decision was driven by the desire to foster a closer working relationship and leverage my expertise for mutual growth. Currently, I am actively engaged in a few two projects for RCFNS. I am contributing to the Vital Signs project, which aims to provide an in-depth analysis of community well-being in Nova Scotia. Additionally, I am working on a special report focused on climate change mitigation and adaptation. This report will highlight various initiatives addressing climate change in Nova Scotia communities, serving as a starting point for individuals and communities to initiate their own climate action efforts.

The evolving partnership between the Atlantic Hub of PhiLab and RCFNS demonstrates the power of collaboration and shared goals in research, community development, and philanthropy. Through joint projects, research endeavors, and the fostering of connections, both organizations have achieved their immediate objectives and strengthened their commitment to positively impacting Nova Scotia’s rural communities. This partnership sets an example for future collaborations that we in the Atlantic Hub

want to replicate.

Challenges Encountered in the Partnership

The primary challenges in the partnership revolved around the logistical and financial considerations needed to kickstart the internship and develop the Vital Signs project with the Rural Communities Foundation of Nova Scotia. The key elements contributing to this challenge include:

The physical distance between Memorial University of Newfoundland and the Rural Communities Foundation in Nova Scotia presented challenges in terms of communication, coordination, and the ability to have in-person interactions. Weekly meetings were held virtually to go through the Vital Signs website, collect and analyze data, and organize the website. The geographical distance between the RCFNS in Nova Scotia and me in Newfoundland impacted the effectiveness of communication and the seamless execution of the partnership.

To overcome this barrier, remote communication tools were harnessed to transcend the geographical divide between Newfoundland and Nova Scotia. Video conferencing, email, instant messaging, and virtual collaboration platforms were leveraged to maintain consistent communication, facilitating real-time interaction despite the physical separation. It was also important to be able to arrange some travel to Nova Scotia to be present with RCFNS.

RCFNS instituted a regimen of regular check-in meetings. I had weekly virtual meetings with the executives of RCFNS. This helped to facilitate communication. This routine communication mechanism facilitated ongoing discussions, enabling swift adaptation to changing circumstances and addressing concerns as they arose. Through these weekly check-ins, we could edit and organize the Vital Signs website, plan the project sequence, and set goals and timelines. Given the potential delay in grant approval that hindered the internship from starting earlier, the partnership displayed flexibility in project implementation. Plans were adjusted to accommodate shifting timelines, ensuring that adjustments to project milestones and expectations were seamlessly integrated.

RCFNS was unable to fully fund the internship due to limited financial resources at the time. This meant I needed to secure external funding from MITACS to support my involvement. This financial constraint impacted my ability to start working with RCFNS

promptly. However, the lengthy review process for the external funder created a gap where I could not initiate the internship and research. This delay in getting started hindered the momentum and progress of the Vital Signs and Climate Change research project.

Aligning the timelines of RCFNS was also a challenge for me. As a student, I had to switch between academic activities and meetings to accommodate both academic requirements and the activities of RCFNS. My availability for the internship, RCFNS needs, MITACS grant application process, academic work, and the subsequent approval timeline had to converge. Any mismatch or delay in these timelines could disrupt the planned collaboration. Balancing these factors while ensuring the partnership remains productive and meaningful required careful coordination, good timing, and proactive communication between the RCFNS, MITACS, and me.

Building successful partnerships involves overcoming challenges like geographical distance, limited funding, and delays in grant approvals. A comprehensive approach was vital to maintaining a productive collaboration. In project planning, securing funding required meticulous planning to meet MITACS program timelines, RCFNS application deadlines, and personal availability. Clear milestones, regular communication channels, and specific deadlines were established to ensure alignment among stakeholders. RCFNS provided crucial assistance with application preparation, sharing essential information and documents, and offering valuable project insights. Stakeholder engagement was key for ensuring a smooth process and addressing challenges from geographical distance, constrained funding, and timeline misalignment.



Reflection on Lessons Learned

Sarah Lavallée's project exemplified collaborative

research's power, demonstrating the benefits of combining academic and organizational expertise for comprehensive research. Engagement with RCFNS and community partners at the Community Impact Conference facilitated collaborative research. Recognizing the value of philanthropy was evident through the partnership, highlighting the critical role of philanthropy, exemplified by RCFNS, in addressing pressing global issues. Philanthropic organizations hold substantial resources and expertise that can drive positive change in local communities.

Through the partnership with RCFNS, valuable lessons were learned about effective collaboration, the role of philanthropy, and overcoming challenges. For instance, I learned valuable lessons regarding the importance of comprehensive planning to align project timelines effectively, the significance of stakeholder engagement for navigating challenges and ensuring project success, the power of collaborative research in combining academic and organizational expertise for impactful outcomes, and the recognition of philanthropy's role in driving positive change and sustainable development in local communities. These insights provide guidance for future collaborations and contribute to advancing community-driven initiatives. As a researcher in this space, honing project management skills and understanding the significance of stakeholder engagement are crucial for facilitating impactful partnerships and addressing complex challenges effectively.

Conclusion

The partnership between the Atlantic PhilLab Hub and the Rural Communities Foundation of Nova Scotia (RCFNS) has exemplified the transformative potential of collaboration in driving community development and philanthropy. Despite challenges such as geographical distance and limited funding, the partnership has successfully navigated these obstacles through careful planning, stakeholder engagement, and a comprehensive and persistent approach to problem-solving. Through joint projects and research endeavors, the collaboration has yielded impactful insights into the potential of collaboration for future co-development and co-production, as well as the significant role of philanthropy in addressing global challenges. Moving forward, the lessons learned from this partnership serve as a valuable guide for the Atlantic Hub, emphasizing the importance of collaboration, stakeholder engagement, and strategic planning in achieving shared goals and driving positive change in communities.



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Challenges, Lessons and Implications of Collecting Social Identity Data in the Social and Community Services Sector

By Isabel Cascante, Director of Research, Public Policy and Evaluation at United Way Greater Toronto; Umair Majid, Manager of Research, Public Policy and Evaluation at United Way Greater Toronto



Isabel Cascante is director of research, public policy and evaluation at United Way Greater Toronto. Isabel is responsible for developing and implementing the organization's research and evaluation strategies, based on a strong evidence base, a commitment to addressing systemic discrimination, and a solid foundation of partnerships and relationships.

Umair Majid is a Manager of Research, Public Policy and Evaluation at United Way Greater Toronto. He supports the organization's research and evaluation projects.

In 2022, United Way Greater Toronto (United Way), in partnership with the Canadian Philanthropy Partnership Research Network (PhiLab), released a series of five case studies exploring innovations in the community services sector propelled by changing needs in community and public health restrictions implemented during the COVID-19 pandemic. *Collaboration, Cooperation, Co-Creation: Case Studies of Social Service Innovations During COVID-19* profiled tailored solutions and practical

lessons learned. Taken together, the five case studies accentuate the innovation capacity that exists within the community and social services sector. Agencies demonstrated remarkable nimbleness, rapidly adapting and redesigning programs, shifting to new delivery mediums and service models, strengthening collaborations within and across sectors, leveraging community knowledge and lived expertise and reaffirming the value of culturally informed practice models.

Our latest case study, *The Be Yourself, See Yourself Pilot Project: Challenges, Lessons and Implications from Collecting Social Identity Data*, profiles benefits, challenges and considerations to strengthen social identity data collection practices within the community services sector (Cascante et al., 2024). When implemented well, social identity data (SID) can help agencies understand who is – and who is not – accessing services, highlight service gaps and disparities, and ensure programs are appropriately designed for those in need of the services. The collection and application of SID is complex and

must be approached with care to avoid perpetuating inequities. As the bulk of exploration on SID collection within program implementation comes from the healthcare sector, this work offers a novel contribution to research on SID practice from the lens of the social and community services sector specifically.

["Social identity data (SID) refers to information related to how individuals or groups self-identify or categorize themselves in terms of social identifiers such as age, sex at birth, gender identity, Indigenous identity, place of birth, race, sexual orientation, and language" (Cascante et al., 2024)]

Through the SID collection pilot featured in the case study ([Be Yourself, See Yourself](#)), 53 agencies attended capacity-building workshops and informal coaching sessions to enhance their SID collection knowledge, capacity and capabilities. Agencies collaboratively tested tools and approaches to collecting and using SID: some agencies embedded SID collection into their program intake processes while others collected the data midway through program delivery; some requested SID from drop-in program participants while others tested the practice in programs with discreet cohorts; some agencies tested paper-based data collection methods and others experimented with digital survey tools; some implemented the survey tool as provided while others adjusted the tool to focus only on those questions they felt were most relevant for their context and data collection and analysis capacities.

While some agencies struggled with analysis and sense-making, others garnered sufficient insights from the data to change their practice. One agency discovered a deeper linguistic diversity among its clientele than previously understood and hired bilingual staff and interpreters to translate program materials and resources and deliver some programs in languages other than English. For another agency, SID provided a more nuanced understanding of the diversity of youth attending their programs, revealing gaps. With this knowledge in hand, the agency tailored outreach and program design to more effectively reach different groups.

This experimentation uncovered important insights on what it takes to implement SID practice effectively, equitably and consistently across the sector. Some lessons learned:

- **At its root, the collection, analysis and use of SID is an equity strategy.** Collecting and analyzing SID can enhance equity in the delivery of social and community services by helping understand and challenge established beliefs about the communities served. SID has the potential to foster a deeper understanding of the identities of those utilizing services and highlight inequities or gaps in the provision and accessibility of services. Such data serves as a learning tool, enabling organizations to make knowledgeable, data-driven choices that inform the development and design of initiatives.
- **Service user perspectives are central to effective SID planning and implementation.** The effectiveness of SID collection ultimately depends on the perceptions and participation of service users themselves. The impact of SID hinges on whether service users and communities see its value, feel comfortable sharing their SID, and assess the benefits as outweighing any potential risks. If not, they retain the right to refuse consent.



When implemented well, social identity data (SID) can help agencies understand who is – and who is not – accessing services, highlight service gaps and disparities, and ensure programs are appropriately designed for those in need of the services.



- **Collaboration and trust-building among funders, agencies and service users is critical.** Power imbalances among funders, agencies and service

users must be acknowledged and lessened, where possible, to facilitate a shift towards a more equitable and trust-based culture within the sector. Providing transparent explanations regarding the reasons for collecting SID, its intended uses, and maintaining communication with service users by sharing insights from the data and the outcomes of related programs are crucial steps in demonstrating the sector's dedication to securing community trust in the SID collection process and beyond.

- **Sustained investments in training and capacity building are required to build sustainable and long-term capacity for SID practice within the sector.** There is a wide range of data maturity or proficiency within the sector, affecting both service providers and funders. Ongoing training is needed to build the infrastructure to support SID collection and analysis. Training should extend beyond mere technical aspects to encompass cultural awareness, trauma-informed data collection methods, and data governance and privacy considerations.
- **More experimentation and learning are needed to steer sector-wide SID practice.** Unanswered questions remain around how and when best to collect SID from service users. Ongoing experimentation, learning and evaluation are needed to refine the approach to SID and maximize its benefits for the sector.
- **While SID has tremendous potential for good, it comes with several risks.** SID collection is not without risks, including unintended objectification and misinterpretation of data and reinforcement of systemic biases and discrimination. When misused, the collection of SID can lead to decisions that exacerbate existing inequities or even create new ones. Additionally, the emotional and psychological impacts of SID collection must not be overlooked. The process could unintentionally trigger trauma, especially if individuals are asked to recall or discuss upsetting experiences connected to their identities. Employing trauma-informed approaches to data collection is vital in reducing these risks and safeguarding participants' well-being (Future Without Violence, 2023).

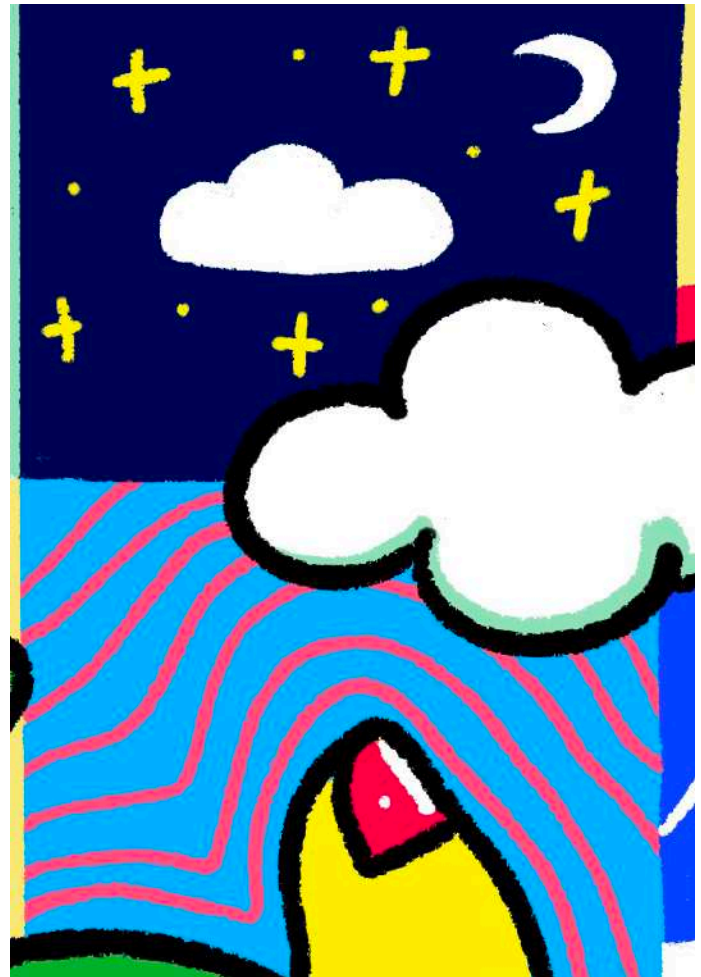
Conclusion

This article shares insights and lessons learned from the *Be Yourself, See Yourself* SID collection pilot project implemented with social and community service agencies. The full case study provides deeper context on the pilot project as well as a list of good practices and implications for SID collection. This is an initial contribution and future research is needed to address key unanswered questions about the optimal conditions for SID collection and how best to leverage SID to drive system-level decisions around investments and service design, analysis, and use in the sector.

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Philanthropy in Transition: The Promise of Trust-Based Approaches in Addressing Complex Social Challenges

By Isidora Sidorovska, Ph.D. in Planning from the University of Waterloo



Isidora Sidorovska holds a Ph.D. in Planning from the University of Waterloo, Canada. Her research examines the complexities of strategic management in public and nonprofit organizations, focusing on the contributions of organizational processes and practices for the achievement of complex social ends. Other research interests include nonprofit and public governance, philanthropic partnerships and the role of trust in inter-organizational collaboration.

The past decade has brought increasing criticism of the widely accepted model of strategic philanthropy, characterized by clear, one-sided leadership in fund disbursement, top-down funding priorities, heightened accountability, rigorous evaluations, and limited space for locally driven solutions¹. This focus on efficiency rather than social change has been found to emphasize power disparities and threaten the sustainability and livelihood of community organizations. It also marginalizes less professionalized organizations which are unable to compete in a highly formal and managerialist system, undermining rather than enhancing the effectiveness of social action. In

addition, a growing understanding of the complexity of social problems and their incompatibility with predetermined solutions and inflexible programming strategies has further eroded the validity of these dominant philanthropic practices.

In response to these criticisms, the trust-based approach “seeks to open the grantmaking system to previously marginalized groups and address inherent power imbalances between funders, nonprofits, and the communities they serve by reducing foundation control in the funder/grantee relationship”². Trust-based philanthropy is based on several principles, including (1) multiyear unrestricted funding; (2) shared collaborative burden in establishing new philanthropic partnerships; (3) simplified paperwork; (4) transparency and responsiveness for increased accountability; (5) soliciting and acting on feedback and (6) support beyond the cheque³. As such, the trust-based rationale among funders is thought to alleviate some of the extreme implications of nonprofit dependency, contribute to the longer-term survival and sustainable operation of community

partners, and model a better balance of power in the philanthropic ecosystem.

So how do the trust-based principles address the core challenges posed by the dominant model of strategic philanthropy, and what is their value proposition?



The practices of trust-based philanthropy hold strong promise in addressing some of the key implications of nonprofit's resource dependency and the structural resource depletion faced by the sector.



1. Tackling the “nonprofit starvation cycle”. Through multi-year unrestricted funding, the trust-based approach enables longer planning horizons, fostering a more strategic and long-term approach to designing programs and initiatives. Unrestricted funding and greater support for operational expenses facilitate staff retention and fair compensation, breaking the cycle of constant staff recruitment and training due to lack of continuity in project funding⁴. Increased flexibility in allocating funding allows much needed investments in nonprofit infrastructure and organizational development, as well as more resources directed to mission-related priorities⁵. The reduced requirements for in-kind or complementary contributions by community partners which have been the norm for some funders,⁶ removes the pressure and complexity of applying and reporting to multiple donors over the same project, while also enabling organizations to adapt programs as circumstances change. Simplified paperwork and sharing the administrative burden of initiating and maintaining philanthropic partnerships

allows community organizations to direct efforts to social action rather than program administration.

In summary, the practices of trust-based philanthropy hold strong promise in addressing some of the key implications of nonprofit's resource dependency and the structural resource depletion faced by the sector.

2. Addressing power imbalances and enabling community leadership. The trust-based approach seeks to balance the power dynamic between grantees through the institution of the following practices: soliciting and acting on feedback, transparency and responsiveness, and support beyond the cheque. For example, soliciting and acting on feedback, as implemented through a lack of strictly defined funding priorities or greater involvement of grantees in grantmaking processes enables community leadership and addresses the power imbalance between funders and grantees. The commitment to greater transparency and responsiveness stipulates increased accountability by funders, further reducing the disproportionate power imbalance in their relationship. Support beyond the cheque helps grantees expand networks and increases the funders' accountability for the programs and partners they support, while also strengthening the quality of the funder-funded relationship. Finally, doing the homework and simplified paperwork assume redistribution of the administrative burden in creating and maintaining philanthropic collaborations. This new role of funders as the initiators of collaboration with community partners can further equalize power imbalance as it removes community partners from their traditional role of applicants in philanthropic partnerships⁷. These measures empower community leadership and shift funders from the traditional role of gatekeepers to proactive partners in collaboration initiatives.

3. Addressing complex social problems. A lot has been written recently on the complexity of social and environmental issues and the lack of suitability of rigid, formal planning models to address them⁸. Complex problems consist of many moving parts and influences which are impossible to fully comprehend, while they continuously evolve with any given solution, making them unpredictable and in constant flux⁹. This reality exposes the main flaw of strategic philanthropy which assumes pre-determined objectives, detailed action plans and monitoring frameworks, lacking the flexibility to adapt plans without significant administrative repercussions. The trust-based

approach offers simplified and minimal paperwork, flexibility in adjusting projects and programs as well as unrestricted funding allocations, all of which are better aligned with the dynamic nature of social change. These practices empower community organizations to quickly adapt programs to better fit their objectives as circumstances in the external environment change. Additionally, the focus on soliciting and acting on feedback, alongside increased transparency, responsiveness and support beyond the cheque can further enable greater community leadership and foster sustainable social change.

Potential Challenges

The trust-based approach shows considerable promise in addressing some of the key issues undermining the effectiveness of social and environmental justice initiatives, allowing greater investment in community organizations and resources, increased flexibility for community-led interventions and a more collaborative and equal relationship between funders and their community partners as the basis for social change. What is also reassuring is that the approach has strongly resonated with funders, with many taking eager steps to apply at least some of the practices of the trust-based approach.

On the other hand, there are also concerns that despite its potential, the model may be shortly lived and swiftly replaced by “the next big thing”¹⁰. A major reason for this is that the implementation of trust-based practices happens in individual funding programs rather than across most of the foundation funding, limiting its contribution towards a more sustainable change of model. In addition, if the core purpose of the trust-based philosophy is to effect a systematic change in the relationship between funders and grantees, its implementation needs to go beyond grantmaking practices and address the full spectrum of foundations’ governance and operating policies.

The implementation of trust-based practices may also face some practical issues as well. For example, it is evident that the trust-based approach requires substantially more resources from foundations, some of which already face limited operational capabilities. If foundations are to take on greater initiative in establishing partnerships with grantees and implement tools such as participatory grantmaking and verbal applications and reporting they need more program

staff, and possibly staff with a different skillset as well. Building relationships with community partners, greater availability to seek and receive feedback, and the provision of support beyond the cheque have similar implications as these new practices necessitate greater operating resources, perhaps across more senior roles in the foundations as well. Subsequently, foundations need to strategically ensure the availability of such additional resources to avoid the adoption of practices they cannot sustain in the long term.



The trust-based approach shows considerable promise in addressing some of the key issues undermining the effectiveness of social and environmental justice initiatives, allowing greater investment in community organizations and resources, increased flexibility for community-led interventions and a more collaborative and equal relationship between funders and their community partners as the basis for social change.



A similar situation may apply to the capacities of some grantees, necessitating further development of their capabilities for greater leadership in facilitating

social change. A good place to start would be the implementation of the trust-based model itself, which so far has mostly been implemented under the unilateral leadership of foundations, despite its collaborative priorities.

In the end, we should also be reminded not to throw the baby out with the bathwater. While it is more than evident that the rigidity of the strategic philanthropy approach has in some ways undermined effective social change, it does not mean that we need to erase all the valuable components that the strategic philanthropic approach has provided. Rigid plans may not work for complex issues, but that does not negate the importance of detailed analysis, well-defined objectives, and clear planning frameworks which remain essential in conditions of complexity. Rather, philanthropy can benefit from using formal plans as a broad guidance and adapting them as circumstances evolve. Within this process, the important shift is creating and sustaining an equal and collaborative relationship between funders and grantees as partners, working together to devise shared objectives and priorities, and continuously adapting their joint interventions for the achievement of desired social ends.

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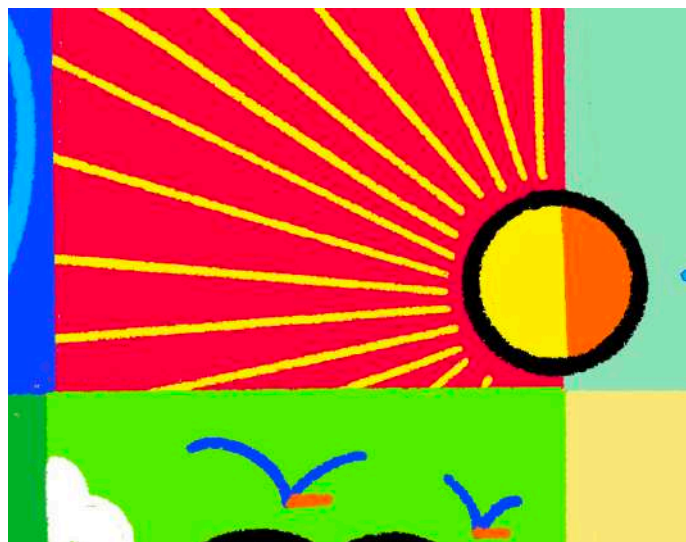
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Research Briefing: Philanthropy for Vulnerable Seniors in Quebec

By Adam Saifer, Assistant Professor in the Faculty of Management at the University of British Columbia Okanagan; Diane Alalouf-Hall, Quebec Hub Supervisor; Lise Roche, Program Director at the Mirella and Lino Saputo Foundation



Adam Saifer is an Assistant Professor in the Faculty of Management at the University of British Columbia Okanagan. He is an interdisciplinary scholar whose research draws on theories of capitalism, nation, and race to critically explore organizational phenomena in the nonprofit and philanthropic sector. His research is oriented around themes of social and economic justice, as well as research partnerships with community-led organizations.

Diane Alalouf-Hall, with a Ph.D. in sociology, directs PhiLab Quebec while also serving as a postdoctoral researcher at the University of British Columbia (UBC) for the project: "The Seniors' Philanthropy Gap: Examining Social Justice Philanthropy's Neglect of Age and Aging." She is currently completing research within the French Red Cross Foundation, where she is dedicated to studying the practices of internationalizing the governance of humanitarian NGOs and their impacts on women's economic strengthening policies.

Lise Roche, Program Director at the Mirella and Lino Saputo Foundation. It is following a career

in associations of organizations for the elderly or disabled people that Lise made the choice to work in a foundation. Her subject-matter expertise benefits these organizations and allows the Mirella and Lino Saputo Foundation to invest in initiatives throughout Quebec. Her understanding of the issues thanks to her experience makes a difference in her relationship with the organizations.

The COVID-19 pandemic exposed and exacerbated deeply entrenched racial, gender, and class inequalities in Canadian society (Campbell-Scherer et al., 2021; Public Health Agency of Canada, 2021). Alongside other institutional actors, the philanthropic sector—comprised of grantmaking foundations, policymakers, charitable organizations, and researchers—quickly mobilized its own version of a pandemic response, engaging in a series of programmatic, strategic, and regulatory efforts to both highlight, and address, these inequalities (Saifer et al., 2021). Key stakeholders made new financial commitments, led educational workshops and webinars, funded new research

projects (e.g., Phillips et al., 2021), and collaborated in the creation of community-targeted funds such as the Indigenous Peoples Resilience Fund (Sidorovska, 2020). In doing so, the philanthropic sector strived to mitigate the unique impacts of the COVID-19 crisis, while simultaneously creating opportunities for critical self-reflection on its own historical shortcomings in meeting the needs of socially and economically marginalized communities.

And yet, this dual process of action and critical self-reflection simultaneously revealed several areas of philanthropic sector neglect—one particularly pervasive example being the social and economic lives of vulnerable seniors. This neglect is surprising given COVID's disproportionate impact on the wellbeing of older adults, which magnified an already dire situation in long-term care facilities tied to austerity policies (Molinari & Pratt, 2021). As a result, in the early months of the pandemic, over 80% of COVID-19 deaths in Canada occurred in such facilities, where only 1% of Canadians reside (Chung, 2020).

In early 2021, the Mirella and Lino Saputo Foundation partnered with PhiLab Quebec to launch a series of research projects aimed at building knowledge around how philanthropic foundations in Quebec are intervening in the social and economic issues faced by vulnerable seniors. The resulting research mobilized a diversity of methodological tools including semi-structured interviews, database analysis of T3010 tax returns, textual analysis of governmental and organizational policy documents, and scoping reviews of both the scholarly and gray literature on the topic.



The social and economic challenges faced by seniors in Canada are shaped by physiological, social, and political-economic factors.



What follows is a brief overview of some of the key findings from this exploratory research. We conclude by highlighting some important lessons from these studies, before outlining the current state of this project which is currently in its second phase.

Findings

The social and economic challenges faced by seniors in Canada are shaped by physiological, social, and political-economic factors.

Extant research points to significant social and economic challenges faced by seniors in Canada, as well as the manner in which these issues are a product of broader political and institutional frameworks. Statistics Canada data indicate a steady rise in the percentage of seniors categorized as 'low-income' over the past three decades, from 3.9% in 1995 (Statistics Canada, 2018) up to 15% in 2021 (Statistics Canada, 2023). This shift follows the introduction of neoliberal economic policies in the mid-1990s (Calasanti, Slevin, & King, 2006; Harvey, 2007) and the ensuing roll-back of social programs including those targeting seniors.

Financial precarity, coupled with both health-related (e.g., loss of mobility, hearing, vision, and memory), and/or social (e.g., loss of family and friends) factors place seniors at a heightened risk of severe loneliness and social isolation as well (Donovan & Blazer, 2020). This reality was exacerbated during the COVID-19 pandemic due to elevated health risks associated with contracting the virus as an older adult (Lebrasseur et al., 2021), as well as both state-mandated—and voluntary—forms of social distancing which disproportionately burdened seniors (MacLeod et al., 2021). These policies had a dramatic impact on the physiological, psychological, and social well-being of seniors (Donovan & Blazer, 2020).

Economic and social marginalization spill over into other aspects of the day-to-day lives of vulnerable seniors. For example, studies estimate that 20% of Canadian seniors are victims of elder abuse: the financial, physical, psychological, sexual, systemic, and/or spiritual abuse of seniors (Burnes et al., 2022). Likewise, one in four seniors in Canada currently lives in substandard housing—a statistic compounded by a growing affordability crisis in seniors' housing in Canada. While affordability issues affect all those living in Canada, it uniquely affects seniors who have significant extra daily costs and unique housing needs, especially those with health conditions or who require

additional assistance (Puxty et al., 2019).

It should be noted that these social and economic challenges are not uniformly experienced across the entirety of the Canadian seniors' population (Statistics Canada, 2021); rather, they intersect with—and further magnify—other forms of marginalization, notably on the basis of race, gender, and citizenship status. For example, Indigenous seniors contend with higher levels of unemployment, poverty, and food insecurity, coupled with substandard housing and social isolation due to historical and ongoing settler-colonial policies (Pace & Grenier, 2017). Immigrant seniors hailing from non-English/French speaking countries grapple with heightened social isolation and loneliness, shaped by language barriers, cultural differences, and citizenship status challenges (Grenier et al., 2022). LGBTQ seniors, on the other hand, may confront a lifetime of discrimination in housing and employment, leading to economic insecurity (Calasanti, Slevin, & King, 2006).

Extant research on the social and economic challenges faced by vulnerable seniors in Canada reveals the significance of foregrounding age and aging in our models and approaches to social justice philanthropy. However, Canadian philanthropy has yet to do so in a substantive way.

The field of philanthropy for vulnerable seniors in Quebec is limited in size; however, some foundations in Quebec are heavily engaged in this issue area in ways that reflect the scientific data on seniors' social and economic needs.

Our field-level examination of philanthropy for vulnerable seniors in Quebec focused on a sample of 40 grantmaking foundations. Twenty-nine of these were private foundations and 11 were public foundations. While some private foundations had explicit commercial ties to seniors' causes (e.g., La Fondation Luc Maurice), the majority held no obvious connection between their organization and vulnerable seniors (e.g., La Fondation Mirella and Lino Saputo). Public foundations were far more heterogenous in form, but could be placed into one of three categories: (1) large community foundations which target the most vulnerable in society (e.g., Centraide du Grand Montréal); (2) public foundations directly connected to long-term care homes whose entire philanthropic mission is in service of their clients and is viewed as a direct continuation of their "business" activities (e.g., The Grace Dart Foundation); and (3) local community foundations that focus exclusively on seniors' issues

without any connection to a larger business or social service (e.g., The Lindsay Memorial Foundation).



The field of philanthropy for vulnerable seniors in Quebec is limited in size; however, some foundations in Quebec are heavily engaged in this issue area in ways that reflect the scientific data on seniors' social and economic needs.



Quebec philanthropic foundation support of vulnerable seniors can be further categorized into five primary issue areas:

1. Palliative care: financial support of palliative care facilities and/or charities that either provide palliative care at home or in a facility to improve end-of-life care quality.
2. Long-term care: financial support of long-term care homes or centres, as well as services, activities, and initiatives in the community that benefit residents of long-term care facilities
3. Social isolation: financial support of a range of community organizations with the goal of integrating vulnerable seniors into their communities as social beings (e.g., intergenerational activities; courtesy calls; communal meals)
4. Autonomy building: financial support of charities that offer services that allow seniors to continue to "age in place" (i.e., live at home) and avoid regular dependence on more formal institutions like long-

term care homes (e.g., health services and personal assistance; meal deliveries; tax clinics)

5. Research: financial support of research programs primarily in one of two domains:
 - Health research, which takes a biomedical lens to successful aging and focuses on issues related to aging and health including, for example, recovery from falls, or living with Alzheimer's.
 - Social research, which focuses on the psychosocial aspects of successful aging, such as how to curb social isolation, the impact of intergenerational programs on older adults, or how to better support successful aging in place

The scope and shape of programs supported by these Quebec foundations reflect empirical evidence indicating areas of profound need. However, they also highlight gaps in programs and services offered by the Quebec government.

In 2012, the Quebec government released Canada's first official policy document on aging titled, *Aging and Living Together, At Home, In One's Community*. The policy document is based on the World Health Organization's (WHO) "active aging" framework which emphasizes the positive aspects of aging, and seeks to optimize opportunities for seniors' health, community participation, and safety. While on first glance, this new framework seems to be a positive step forward, research suggests some unintended consequences of its proliferation, with significant implications for philanthropy.

Joy (2018), for example, notes that the active aging paradigm frames traditional understandings of seniors, which equate aging with vulnerability, as discriminatory. She argues, however, that the active aging framework simultaneously reimagines the very real risks associated with aging as a source of shame, constructing vulnerable seniors as a burden due to their unique social and material needs. Many seniors in Quebec experience exclusion from their communities, and face restricted access to services and activities that could enhance their engagement. By focusing on what successful aging looks like at the individual level, and placing responsibility for successful aging at the feet of individual seniors, the state evades their own responsibilities for providing robust social and economic programs for seniors. This neoliberal approach poses new challenges for civil society

actors, including those in the philanthropic sector. The COVID-19 pandemic has clearly demonstrated this: foundations and community organizations have seen demand for services skyrocket, and the scope of their mandates expand rapidly.



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Philanthropic foundations see themselves as complementing state-support of vulnerable seniors and not as its replacement.

The principle of subsidiarity—the idea that social and economic issues should be dealt with at the community-level by civil society actors—was viewed as a constraint by the philanthropic foundations we spoke with. They expressed that subsidiarity often implies a reduction in state funding or involvement, thereby requiring foundations to take increased responsibility for vulnerable seniors. For these philanthropic organizations, the validity of subsidiarity as a principle closely depends on the necessity and complementarity of their interventions in relation to existing state-funded programs.

To this end, the foundations we spoke with do not see themselves as replacing the state, but rather as complementing it by providing additional resources and programs in a given issue area. This perspective is

notable when situated in relation to the central role of the welfare state in Quebec. The state is tasked with ensuring the delivery of essential public services and granting social benefits, all supported by a significant tax burden imposed on citizens. As a result, the manner in which foundations approach and interpret subsidiarity reveals a complex dynamic and process of negotiation between the philanthropic sector and the state, where the need to complement state-funded initiatives coexists with the ongoing assessment of the effectiveness and relevance of these philanthropic interventions to the Quebec social landscape. This entails a rigorous and sometimes difficult-to-navigate validation process, which is currently not supported by a decision-making tool. During the COVID-19 pandemic, for example, the philanthropic and charitable sector inhabited a crucial role in supporting vulnerable seniors, taking charge of what the state could no longer manage. With this pervasive and all-encompassing medical emergency, the state had to place their trust in philanthropy, as it could not be everywhere at once.



Philanthropic foundations see themselves as complementing state-support of vulnerable seniors and not as its replacement.



Our research further reveals the importance of carefully considering this subsidiary relation between the state and civil society when formulating a philanthropic policy or intervention around the social and economic issues faced by vulnerable seniors. For philanthropies, subsidiarity is a defining feature of their institutional role in Quebec society. Therefore, they highlighted the importance of developing a detailed policy or vision that articulates how their interventions around vulnerable seniors are made within an existing system

of action. This subsidiary policy or vision requires the establishment of boundaries, the recognition of modalities among stakeholders in a system of action, and the acknowledgement of the distinct responsibilities and limits of civil society, for-profit, and government actors, as they relate to the social and economic challenges faced by vulnerable seniors

Understanding Philanthropy's Neglect of Vulnerable Seniors

This exploratory research has revealed a number of important points regarding the current state of Quebec philanthropy's engagement with vulnerable seniors. First, we documented the extent and contours of the social and economic challenges faced by vulnerable seniors in Canada, and highlighted potential areas of intervention for philanthropies. Second, we provided an overview of some of the key philanthropic players in the field, the primary areas in which they intervene, and how these interventions map onto the extant social gerontological research. Third, we discussed the institutionalization of the active aging paradigm in Quebec, and the potential impacts this has on philanthropies engaged in work with vulnerable seniors. Finally, we explored how foundations that are active in this issue area understand and navigate their responsibilities in relation to the state. In doing so, our research reveals that while there is a strong group of actors working in this area, and there is a clear connection between the issues faced by vulnerable seniors and other increasingly popular social justice-related domains in philanthropy, there remains a profound neglect of this issue area at the sectoral level.

Existing interdisciplinary research suggests that, at core of this neglect, is a phenomenon known as "ageism." Ageism encompasses negative or positive stereotypes, prejudice, and discrimination based on chronological age (Iversen et al., 2009). It extends beyond individual interactions, influencing organizational practices and state-level policies, constructing a society that assumes that everyone is young. Encompassing both structural and cultural dimensions (Bytheway 1994), theories of ageism can give insight into philanthropy's neglect of vulnerable seniors.

At the psychological level, Terror Management Theory (Martens et al., 2005) suggests that philanthropic engagement in the realm of innovation and youth culture, at the expense of seniors, may provide donors

with a sense that they are an important part of a future world that is sustainable, thereby interrupting deep-seated discomfort and anxiety around their own aging and mortality. Social Identity Theory (Tajfel, 1981), on the other hand, would indicate that by neglecting seniors' issues, philanthropists—many who fall into the category of older adult—are able to define themselves in relation to, but separate from, the elderly who are “in need of assistance.”

At the organizational level, Age Segregation Theory (Hagestad & Uhlenberg, 2006) suggests that society frames seniors as existing outside or apart from the social world, which could explain philanthropy's emphasis on palliative care and disease research, and its neglect of the social and community aspects of aging. Intergenerational Conflict Theory (North & Fiske, 2013), on the other hand, suggests a hesitancy to give to seniors based on the belief that older generations are responsible for the social, economic, and environmental problems that their grantmaking is responding to.

At the political-economic level, Modernization Theory (Cowgill & Holmes, 1972) suggests that as younger generations overtake seniors as primary holders of knowledge and value in modern societies, the notion that seniors are a societal burden becomes further entrenched, leading to their construction as “sick bodies” rather than those with social and economic needs.

While these theories can provide some insight into the state of philanthropy for vulnerable seniors in Quebec, empirical research in this domain is warranted. As a result, in January 2024, we launched phase two of this research which explores the following questions:

- (1) How can we explain the philanthropic sector's neglect of vulnerable seniors?
- (2) What are the material, cultural, and political barriers to integrating age and aging into social justice philanthropy?

Through semi-structured interviews, this secondary phase of research will centre the perspectives and experiences of philanthropic foundations, charities, member associations, and research initiatives that have demonstrated a sustained commitment to working with marginalized seniors through programming, funding, collaboration, and/or advocacy. In doing so, we will generate novel insights for how the

philanthropic sector can better support marginalized seniors via novel approaches to policymaking, programming, and advocacy.

Pour aller plus loin

[PhiLab Podcast. Are We Failing Seniors? | Adam Saifer](#)

[PhiLab Podcast. Subventionner ou subsidiarité? | Lise Roche.](#)

[Étude de cas sur la cause des aînés-es au Québec: Regards croisés sur les dons des fondations subventionnaires et la subsidiarité de l'État en lien avec la cause aînée – Phase I](#)

[Étude de cas sur la cause des aînés-es au Québec: Regards croisés sur les dons des fondations subventionnaires et la subsidiarité de l'État en lien avec la cause aînée – Phase II](#)

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NAVIGUER LA POLITIQUE | NAVIGATING POLICY





NAVIGUER LA POLITIQUE | NAVIGATING POLICY

Setting International Standards to Reverse Shrinking Civic Space

By Casey Kelso, *Senior consultant on advocacy and strategy, WINGS*



Casey Kelso is a senior consultant on advocacy and strategy with experience living in and working with activists in Sub-Saharan Africa (particularly Southern Africa) and the Arab world (Middle East and North Africa). He has held senior leadership positions at International Crisis Group, Transparency International and Amnesty International.

Major hurdles to philanthropy all over the world are rising. Registering foundations can be expensive, time-consuming and subject to official, often arbitrary discretion. Sometimes state harassment and negative campaigns are mounted, especially against human rights and watchdog organisations – and those who fund them. Tighter restrictions globally on cross-border charitable giving can undercut a healthy civil society and philanthropic ecosystem. All these barriers can block progress toward a more just, inclusive and sustainable world. Vigorous advocacy, however, has created legal yardsticks to promote and defend civic space, which is indivisible from the space for local

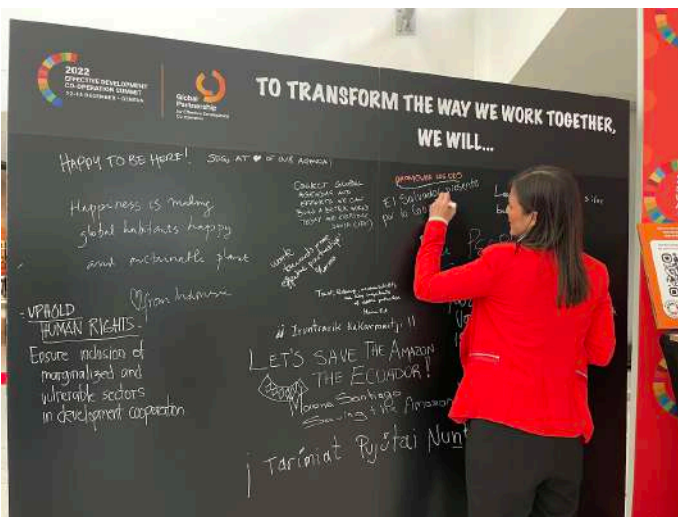
philanthropic giving to civil society.

This brief round-up of the advocacy experiences by WINGS' worldwide network of foundations and philanthropic support organisations reviews several global policy setting venues that have affirmed the fundamental right to contribute time, expertise and funds. In international standard-setting processes, WINGS elevated the diverse experiences of its worldwide network members in consultations to promote good public policy on philanthropy's civic space. Successful advocacy led to acknowledgements by government authorities in declarations and guidance about the need for an enabling environment for philanthropy to effectively resource civil society.

Shrinking philanthropic space versus “soft” legal standards

The Global Philanthropy Environment Index (GPEI, 2022) described how about one-third of the 91 countries and economies it studied experienced a

restrictive environment for cross-border philanthropic flows. While giving by private philanthropy — foundations, corporations, and individuals — grew worldwide between 2018 and 2020, transfers of private charitable contributions fell. Since 2012, 30 countries have introduced or extended restrictions on cross-border philanthropy (Rutzen, 2015). The causes vary from rising nationalism and a questioning of Western power, while some governments may have an ambivalence about philanthropy's tendency to support civil society's role in government accountability (OECD, 2018). It should be acknowledged that not all of the limits to cross border money transfers are negative. Nations have a legitimate interest in controlling money laundering and restricting support of terrorism. These legitimate concerns, however, should not lead to either unintentional or politically motivated restrictions that go beyond to close civic space.



"Participant from El Salvador at the 2022 Effective Development Cooperation Summit in Switzerland", Source: Global Partnership for Effective Development Cooperation, December 2022.

Sometimes national central banks block grants by international foundations to local community foundations and national philanthropy. More often, domestic grantees are overwhelmed by bureaucratic requirements for accessing foreign funding: local foundations may need prior government authorisation or specific bank accounts to receive funds from sources outside the country. And diaspora communities from many low- and middle-income countries find it challenging to send back voluntary gifts for building schools, hospitals, and other vital projects. All are symptoms of a sometimes "un-enabling environment" for philanthropy globally.

Unhindered giving by citizens domestically or across borders provides resources to civil society and other social change actors to address the critical challenges that face our planet, including climate catastrophe, the rise of authoritarian ruling parties, and recovery from armed conflict. In the long run, the solution is to build local funding ecosystems for sustainable local financing for bottom-up, locally led development. That can only happen in dialogue with governments, who bear the responsibility for setting responsible, proportionate legal regulations on national and community-level foundations. References to legal state obligations and prior official declarations and commitments take the emotional or political tone out of policy discussions, helping dialogue.

Emerging international standards on civil society's ability to receive and use funds for its activities have become a key lever in advocating with governments in push back to regulatory restrictions. Set out in Article 20 of the Universal Declaration of Human Rights and Article 22 of the International Covenant on Civil and Political Rights, the right to fund and receive funding is a human right. Freedom of association includes the ability (of civil society) to seek, receive and use resources — human, material and financial — from domestic, foreign and international sources, as defined by UN experts.

While official human rights treaties set "hard" legal standards that states ratify and become obliged to implement, there are also declarations and guidelines by the UN or the broader international community that are not seen as creating obligations. Nonetheless, those unofficial "soft law" standards can motivate countries to take corrective action when rights are violated, or civic space is hemmed in by overly restrictive regulations. The neutral wording of international "soft law" standards, in the absence of a concrete legal obligation, can help build common ground with national authorities.

With little fanfare among civil society, a human rights expert framed an important international standard last year.

A new UN standard on philanthropic space

In June 2023, the UN Special Rapporteur on the Rights to Freedom of Peaceful Assembly and of Association, Clément Nyaletsossi Voule, issued detailed recommendations and best practice examples for the regulation of philanthropy and

the creation of an enabling environment for civil society organisations to enjoy their right to access resources. The General principles and guidelines on ensuring the right of civil society organisations to have access to resources (A/HRC/53/38/Add.)⁸ underscore civil society's right to access resources, including foreign funding, as an inherent part of the right to association. Principle 6 called for unrestricted international transfers, suggesting sectoral equity in access to resources by both the corporate and civil society sectors. The guidelines further called for tax incentives for donations to civil society which help convey the message that States recognize the important role of associations in addressing societal needs, thus combating the stigmatization they often face. "Best practice dictates that States should equally promote unrestricted philanthropic flows across borders," the UN Special Rapporteur said.

Under Principle 7, governments were asked to "... take positive measures to ensure associations are protected from harassment, smear campaigns, threats, and attacks, including on the basis of the sources of their funding" (para. 41). The Guidelines also made an unambiguous recommendation that "States must respect, protect and facilitate associations' right to freely seek, receive and use foreign funding and promote cross-border philanthropy" (para. 50).



"From left to right, Peter Laugharn, CEO, Conrad N. Hilton Foundation; Sara Aviel, President and CEO, Inter-American Foundation; Sean McKaughan, Board Chair/President, Avina Foundation; and Rose Maruru, founder and CEO, Epic Africa; speaking together about locally led development at a WINGS side-event to the UN General Assembly". Source: InterAmerican Foundation, September 2023.

WINGS members in the UK, USA and across the world inputted case studies, best practice examples, and suggestions for wording about tax incentives for charitable giving, repeal of laws and regulatory

measures that unduly restrict foreign funding, and the reduction of administrative burdens or unduly high fees charged differently than those for corporations to mobilise international resources. The UN Special Rapporteur's Guidelines include all of the aspects that WINGS advocated. So far, however, this new standard has received limited public attention or press coverage.

Other standards, however, have the full engagement and attention of international donors at the OECD.

Donor learning materials on funding space

The OECD Development Assistance Committee (DAC) Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance⁹ is "the first international framework to guide and incentivize development co-operation and humanitarian assistance providers in advancing their policies and practices to support civic space and civil society actors, at home as well as in partner countries or territories". As a standard developed jointly by the 32 member countries at the OECD, the Recommendation includes provisions on respecting, protecting and promoting civic space, and supporting and engaging civil society. Governments are asked to "... work to strengthen civil society actors, including their ability to develop local financial resource streams and to protect and promote civic space".

To steer the OECD's work on civic space, there is a DAC Community of Practice on Civil Society that brings together representatives of major donor agencies. As a counterpart, the OECD also created the DAC-CSO Reference Group of civil society organisations, which was closely consulted in the drafting of the civil society recommendation. This Reference Group of civil society experts continues to play a role in developing materials to help donors understand and implement best practices on how to protect civic space in OECD and partner countries.

As a member of the Reference Group, WINGS and its members provided important input from a philanthropic perspective into draft toolkits¹⁰ for implementing the DAC Recommendation on Civil Society. WINGS contributed to OECD DAC toolkits that address issues such as "Shifting power within partnerships", "Funding civil society in partner countries", and "Respecting, protecting, and promoting civic space in partner countries". Each draft has been circulated to interested WINGS members

for comment.

The OECD is also the secretariat for the Global Partnership for Effective Development Cooperation (GPEDC), another global grouping that has taken “soft law” action for civic space.

National dialogues on philanthropy’s contribution to development

The Global Partnership for Effective Development Cooperation (GPEDC)¹¹ brings together 161 countries and 56 organisations to strengthen the effectiveness of development co-operation to achieve progress towards the SDGs. The GPEDC promotes four development effectiveness principles¹², which are 1. country ownership, 2. a focus on development results, 3. inclusive partnerships, and 4. enhancing transparency and mutual accountability between all development actors. The GPEDC grouping of governments aims to strengthen the effectiveness of multi-stakeholder development co-operation to achieve progress towards the SDGs.

In its fourth monitoring round¹³ taking place between 2023 to 2026, a multi-stakeholder monitoring exercise is being led by some 54 country governments with input from national actors including philanthropy, CSOs, local authorities, private sector, trade unions and parliamentarians, as well as international development partners and other development actors. That assessment will then ground discussions at country-level with evidence about the national enabling environment for CSOs, among other issues. As part of this process, WINGS members are involved in providing feedback in their countries about their enabling environment and their own effectiveness.

A “soft law” standard was set in Switzerland at the GPEDC 2022 Effective Development Co-operation Summit in 2022, which had more than 600 participants from over 111 countries. WINGS facilitated a delegation of 15 representatives of the global philanthropy network, from the Bill and Melinda Gates Foundation and Charities Aid Foundation UK to the Arab Foundations Forum, CivSource Africa and Comunalia of Mexico. WINGS lobbied before and during the Summit for a strong outcome statement to reaffirm the importance of a positive political, financial, legal and policy context in which philanthropy works. The GPEDC Geneva Summit Declaration¹⁴ emphasised creating the necessary trust for inclusive partnerships and improved sustainable development

outcomes, with governments pledging to “...build trust (and) safeguard stakeholders’ enabling environment.” (para. 24)



“WINGS member Tatiana Fraga Diez, former Executive Director of Comunalia Foundation of Mexico, speaking on a panel with USAID, SIDA and the UNDP about the localisation of aid at the 2022 Effective Development Cooperation Summit in Switzerland.” Source: Global Partnership for Effective Development Cooperation, December 2022.

Setting the foundation for future national dialogues on civic space, the GPEDC Declaration affirmed: “We are determined to reverse the trend of shrinking of civic space wherever it is taking place, and to build a positive environment for sustainable development, peaceful societies, accountable governance and the achievement of the 2030 Agenda and the SDGs. We are determined to accelerate progress in providing an enabling environment for civil society, including in legal and regulatory terms, in line with internationally agreed rights.” (para.25) It is significant that those promises will be assessed by the GPEDC-mandated monitoring process and future national dialogues with civil society including philanthropy.

Through these less formal general principles, recommendations and declarations, philanthropy organisations have an opportunity for follow-up accountability advocacy on their implementation at country level to improve the national enabling environment.

Conclusion

Philanthropy remains a vital part of civil society, yet it also is a distinct subset that brings a unique set of opportunities and abilities that make it particularly constructive as a funder and conduit of resources to civil society. The sector also can have both national and international influence with governments including donor nations, corporate foundations

and the private sector. Philanthropic organisations therefore can become a major target when authorities tighten the political, financial, legal and policy context in which civil society operates. On the other hand, philanthropy's unique position allows it to convene multi-stakeholder collaborations to advocate for an enabling environment for all civil society.

The value of informal international standards for civic space -- as an important lobbying lever that can help build bridges with governments and allies among international development partners -- lies in their use by advocates at national and local community levels. The key question is how to make that link from global to local advocacy. This is a programmatic question for WINGS and other networks to answer through good information sharing, co-creation of policy positions, support for local advocacy capacity, and resource mobilisation for national or regional campaigns. At stake is the effective development that contributes to achieving the ambitious 2030 Agenda goals.

Notes

1 WINGS is a global network of philanthropy support and development organisations committed to ensuring philanthropy reaches its fullest potential as a catalyst for social progress. Its growing community of thought leaders and changemakers include more than 200 members across 58 countries. See the WINGS [website](#) for more information about its advocacy and policy work.

2 Indiana University, Lilly Family School of Philanthropy, "The Global Philanthropy Environment Index 2022", accessed at [here](#).

3 Rutzen, Douglas, "Protectionism chills cross-border giving" (Special Feature), Alliance Magazine, September 2015, accessed [here](#). See also Rutzen, Douglas, "Aid Barriers and the Rise of Philanthropic Protectionism", International Journal of Not-for-Profit Law, March 2015, accessed [here](#).

4 OECD, "Private Philanthropy for Development - Second edition: Data for Action," The Development Dimension, December 2021, accessed [here](#).

5 Una Osili and Aloysius Uche Ordu, Brookings Institute, "How remittances and philanthropy meet development challenges in Africa". Foresight Africa, April 2023, accessed [here](#).

6 United Nations, Universal Declaration of

Human Rights, Article 20, accessed [here](#) and also the United Nations, "International Covenant on Civil and Political Rights", Article 22, accessed [here](#).

7 United Nations General Assembly, Report of the Special Rapporteur on the rights to freedom of peaceful assembly and of association, Maina Kiai, April 2013, A/HRC/23/39, accessed [here](#).

8 United Nations, "General principles and guidelines on ensuring the right of civil society organizations to have access to resources", Report of the Special Rapporteur on the rights to freedom of peaceful assembly and of association, June 2023, A/HRC/53/38/Add., accessed [here](#).

9 OECD, Development Co-operation Directorate, Development Assistance Committee (DAC) Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance, OECD/LEGAL/5021, April 2023, accessed [here](#).

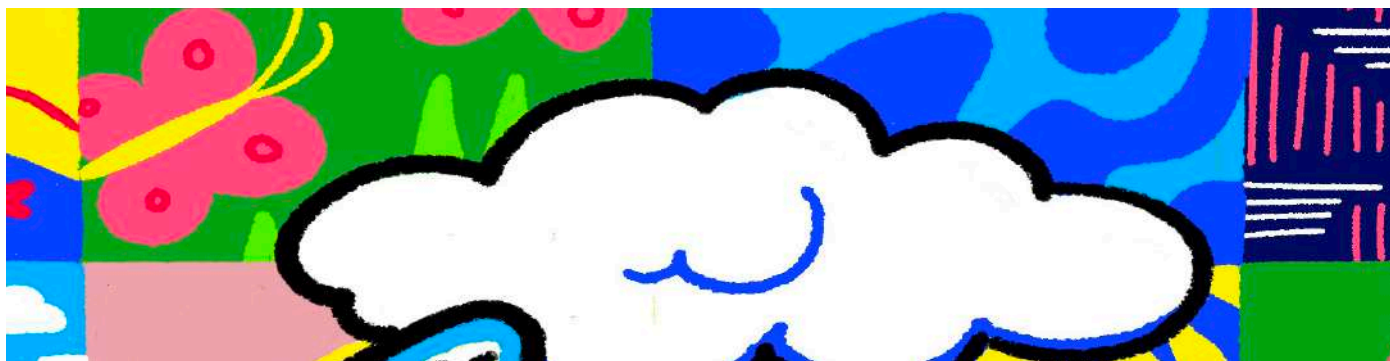
10 OECD, Development Co-operation Directorate, Development Assistance Committee (DAC), "Update: DAC Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance", April 2023, DAC Meeting, 8 March 2023 (Session 2/2), accessed [here](#).

11 GPEDC (Global Partnership for Effective Development Cooperation), Infographic: "The Global Partnership at a Glance", October 2020, accessed [here](#).

12 GPEDC, "The Effectiveness Principles", accessed [here](#).

13 GPEDC, "Effective Development Co-operation GLOBAL DASHBOARD", accessed [here](#).

14 GPEDC, "2022 Effective Development Co-operation Summit Declaration", December 2022, accessed [here](#).



NAVIGUER LA POLITIQUE | NAVIGATING POLICY

La transition vers une finance durable Quelle influence des fondations?

Par David Grant-Poitras, *Candidat au doctorat en sociologie à l'Université du Québec à Montréal et chercheur et coordonnateur au sein du PhiLab-Québec*



David Grant-Poitras est candidat au doctorat en sociologie à l'Université du Québec à Montréal. Il réalise une thèse par articles dans le cadre de laquelle il s'intéresse au positionnement des fondations philanthropiques dans la transition socio-écologique. David agit également comme chercheur et coordonnateur au sein du PhiLab-Québec.

La face cachée des fondations subventionnaires

Les dernières années ont été marquées par diverses crises : creusement des inégalités sociales, dérèglement climatique, pandémie mondiale, effondrement de la biodiversité et inflation galopante. Intervenant au sein de secteurs d'activités directement affectés par ces crises, les fondations philanthropiques ont été forcées de repenser leurs pratiques et de se montrer innovantes afin de réactualiser leur pertinence dans notre société. Les récents débats sur les rôles et responsabilités des fondations, face aux crises identifiées, ont principalement porté sur la « dimension subventionnaire » de leurs activités.

C'est le cas par exemple de la récente modification de la Loi sur la bienfaisance entourant la hausse du quota de déboursement et la possibilité de soutenir des donataires non reconnus. C'est aussi vrai pour les épineuses réflexions en matière de justice sociale et de décolonisation, lesquelles ont porté tantôt sur l'application des principes d'Équité, Diversité et Inclusion, tantôt sur une attribution plus équitable des dons philanthropiques à l'intention de populations sous-desservies.

Somme toute, la « dimension investissement » des fondations continue d'échapper à cette mise en débat de ce qu'elles devraient et pourraient faire face à ces crises. L'essentiel de l'attention médiatique et scientifique est en grande partie braqué sur l'argent que les fondations donnent, et non sur celui qu'elles investissent en vue de dégager des rendements. Cette myopie collective vis-à-vis tout un pan de l'activité des fondations est d'autant plus problématique que les investissements représentent la plus grande partie de leur richesse. En 2020, les fondations canadiennes

ont réalisé des dons à hauteur de 8,3 milliards de dollars alors qu'elles détenaient, en contrepartie, 123 milliards d'actifs placés sur les marchés financiers. Les dons des fondations équivalent ainsi à un peu moins de 7% de la totalité des actifs sous leur contrôle. Et il s'agit, par ailleurs, d'un ratio qui décroît année après année¹.

Dès lors, force est de questionner ce qui advient des neuf dixièmes (et plus) de la richesse des fondations. Mettent-elles en œuvre des stratégies d'investissement qui, par-delà les préoccupations purement financières en termes de risque-rendement, cherchent à apporter des solutions à ces diverses crises sociétales plutôt qu'à les alimenter? Dit simplement, les acteurs philanthropiques travaillent-ils à l'édification d'une finance durable² et, le cas échéant, comment caractériser leur contribution? C'est en capitalisant sur des travaux de recherche conduits au PhiLab sur l'engagement des fondations québécoises dans le domaine de la finance durable que seront esquissés quelques éléments de réponses dans le présent article.



Si la tendance se maintient, ce seront éventuellement les fondations conservatrices, c'est-à-dire celles attachées à une gestion financière traditionnelle, dont le comportement sera jugé « déviant » (ou à tout le moins moralement discutable) et qui s'exposeront à des risques réputationnels.



Des entrepreneurs de morale dans l'univers de la finance

Dans le but de synthétiser les connaissances accumulées au fil des années sur le sujet, nous présenterons le rôle des fondations dans la finance comme celui « d'entrepreneur de morale ». Conceptualisé par le sociologue Howard S. Becker, l'entrepreneur de morale réfère à un individu, un groupe ou une organisation qui, par ses initiatives, cherchent à créer et à faire adopter des normes au sein de la société³. Dans le champ social qui nous intéresse, cela revient à voir comment les fondations qui défendent des considérations sociales et/ou environnementales dans la sphère financière travaillent par le fait même à réformer les cadres éthiques de la finance. À titre illustratif, dans les sections suivantes, nous mettrons en lumière deux modes d'engagement par lesquels se déploie la fonction moralisatrice qu'endossent des fondations basées au Québec dans l'optique de conduire la finance vers une plus grande durabilité.

1. Normaliser l'investissement responsable et les principes ESG

Un premier mode d'engagement relève du courant de l'investissement socialement responsable (ISR), lequel se caractérise par l'intégration de critères environnementaux, sociaux et de gouvernance (ESG) dans la sélection de titres financiers. En exploitant la position surplombante et structurante de la finance par rapport au développement économique, l'ISR tente de discipliner les entreprises eu égard à divers enjeux relatifs à leur responsabilité sociale et environnementale (amélioration des conditions de travail, protection de l'environnement, réduction des inégalités, lutte aux changements climatiques, justice fiscale, etc.).

Tandis que l'ISR était le fait d'une minorité de fondations avant-gardistes il y a de cela à peine dix ans, nous nous approchons aujourd'hui du point de bascule. Une étude conduite entre 2018 à 2020 auprès de 93 fondations canadiennes révélait que 54% d'entre elles géraient leur fonds de dotation selon une stratégie d'ISR⁴. Si la tendance se maintient, ce seront éventuellement les fondations conservatrices, c'est-à-dire celles attachées à une gestion financière traditionnelle, dont le comportement sera jugé « déviant » (ou à tout le moins moralement discutable) et qui s'exposeront à des risques réputationnels.

Dès lors, l'appropriation de l'ISR par les fondations permet de remettre en question et de redéfinir

ce que devrait être une gestion de portefeuille « philanthropiquement acceptable ». La directrice d'une fondation très impliquée dans le domaine atteste éloquemment de cette lutte symbolique qui se profile dans le secteur philanthropique par rapport à la question de l'investissement.

Je pense qu'on pourrait même être interdit [comme fondation] de faire des placements traditionnels. Ou à tout le moins nommer ce placement-là, de dire ouvertement que traditionnel équivaut à des placements destructeurs et non durables. [...] Tant qu'à faire, on pourrait même instaurer des terminologies pour clarifier de quoi on parle exactement quand on parle d'investissements traditionnels : on parle d'investissement qui sont hautement destructeurs, à tous les niveaux, que ce soit les conditions de travail ou notre capacité de prendre des décisions justes et équitables par rapport à la nature et l'environnement.

Ajoutons que cette croissance rapide de l'ISR parmi les fondations subventionnaires contribue non seulement à sa normalisation auprès d'autres investisseurs institutionnels. En intégrant des critères ESG à la gestion de leur portefeuille, elles prêchent par l'exemple et donnent du galon à la transition vers un paradigme financier où la recherche de rendements ne se réalise plus à n'importe quel prix, mais est encadrée par un ensemble de considérations relatives à la promotion du bien public.

La mobilisation du secteur philanthropique en faveur de ce courant financier est d'autant plus importante dans le contexte économique actuel, caractérisé par un recul des parts relatives de marché de l'ISR comparativement aux actifs traditionnels des dernières années. En effet, 69% des actifs canadiens sous gestion s'inscrivaient dans le créneau de l'investissement responsable en 2019, alors que ceux-ci ont chuté à 49% du marché en 2022⁵. La quinzaine de représentant·e·s de fondations que nous avons interviewé·e·s en 2023 étaient unanimes sur le fait que, malgré les soubresauts des marchés financiers ces dernières années, accélérer cette transition vers la finance durable représente un impératif moral qui transcende l'optimisation des rendements. Comme le fait valoir le directeur d'une petite fondation universitaire :

Pour des questions de principe, de valeurs, je pense que de toute façon, quand bien même nous ferions plein de rendements sur notre argent, on n'est pas plus avancé si la planète est détruite. Faut être intelligent à un moment donné.



En intégrant des critères ESG à la gestion de leur portefeuille, elles prêchent par l'exemple et donnent du galon à la transition vers un paradigme financier où la recherche de rendements ne se réalise plus à n'importe quel prix, mais est encadrée par un ensemble de considérations relatives à la promotion du bien public.



2. Rehausser les standards éthiques du « socialement responsable »

Cela étant dit, la majorité des fondations étudiées sont d'avis que l'ISR, lorsque limité à l'utilisation des principes ESG dans les choix de placements, représente bien davantage un point de départ qu'un point d'arrivée. Loin de constituer une panacée, plusieurs fondations pointent du doigt le caractère de plus en plus *mainstream* et inoffensif des critères ESG.

On leur reproche d'être trop peu restrictifs, de se contenter d'une logique du moindre mal (« *do no harm* ») et, par le fait même, de permettre à des entreprises opérant dans des secteurs d'activités éthiquement questionnables de se qualifier dans des fonds ou indices soi-disant responsables. Dans le même ordre d'idées, plusieurs acteurs philanthropiques interrogés reprochent à l'ISR l'absence de méthodologies fiables et standardisées pour bien évaluer les externalités positives des entreprises, ce qui ouvre la porte à toutes sortes de pratiques d'écoblanchiment et de

socio-blanchiment au sein de l'industrie. Dans de telles conditions, l'ISR n'intervient guère comme un moteur de transformation et de responsabilisation de l'activité économique, mais est réduit à une modalité d'évaluation plus exhaustive des risques pesant sur les entreprises.



(...) elles viennent grossir les rangs d'une large coalition mondiale d'investisseurs institutionnels pour qui les actifs associés à l'industrie fossile – au même titre que l'industrie du tabac ou de l'armement – sont moralement toxiques et ne peuvent être désignés de « socialement responsable » dans le contexte d'urgence climatique dans lequel nous nous trouvons.



Nos recherches ont toutefois permis de constater que plusieurs fondations sont conscientes de ce problème et déterminées à la surmonter par divers moyens. Dans l'optique de conférer plus de mordant à l'ISR, plusieurs fondations mettent en œuvre des stratégies qui ont justement pour ambition de revoir à la hausse les standards éthiques du « socialement responsable ». En témoigne de façon éloquent le fort niveau d'adhésion du milieu philanthropique au mouvement de désinvestissement des énergies fossiles.

Les organisations qui s'approprient cette exclusion financière ont toutes affirmé l'inscrire formellement

dans la politique d'investissement que sont tenus de respecter leurs gestionnaires de portefeuilles. Le fait de formaliser ainsi cette directive est souvent perçu comme un geste nécessaire, puisqu'il est chose courante comme investisseur de se retrouver dans des fonds étiquetés socialement responsables mais n'excluant pas d'emblée les entreprises dont la majorité des activités est liée à l'extraction ou le transport de combustibles fossiles. Les fondations ayant adopté le désinvestissement forcent leurs gestionnaires à aller plus loin que ce que propose leur offre habituelle de produits financiers éthiques. De plus, elles viennent grossir les rangs d'une large coalition mondiale d'investisseurs institutionnels pour qui les actifs associés à l'industrie fossile – au même titre que l'industrie du tabac ou de l'armement – sont moralement toxiques et ne peuvent être désignés de « socialement responsable » dans le contexte d'urgence climatique dans lequel nous nous trouvons.

Sans les approfondir dans le détail ici, plusieurs autres pratiques et initiatives mises de l'avant par des fondations contribuent, à leur façon, à rendre l'investissement socialement responsable digne de ce nom. Nous en nommerons deux.

- Les stratégies déployées en matière d'engagement actionnarial sont un parfait exemple. Dénnotant une posture plus engagée et militante, ces stratégies visent à exploiter son statut d'actionnaire dans l'optique d'exercer des pressions sur les entreprises afin qu'elles améliorent leur performance extra-financière par rapport à des enjeux ESG spécifiques. Plusieurs fondations interrogées ont affirmé mandater des firmes externes⁶ pour les accompagner dans ces démarches souvent complexes et exigeantes à porter.
- Le Grand championnat ESG canadien, piloté conjointement par sept organisations philanthropiques en 2021, fournit un autre exemple éloquent⁷. Cet événement a rassemblé une diversité de gestionnaires de placements afin qu'ils fassent compétition les uns contre les autres pour démontrer la crédibilité de leurs approches d'investissement ESG. À l'issue du championnat, les gestionnaires gagnants se sont partagé un mandat d'investissement totalisant 104.5M\$. Un rapport a aussi été produit pour cerner les tendances clés de l'industrie ISR et mieux informer les détenteurs d'actifs dans leurs futures pratiques d'investissement ESG⁸. Devant un marché de l'ISR en pleine croissance, le Championnat a permis

de faire un pas de côté pour mieux départager ce qui constitue une offre ESG véritablement de qualité versus ce qui relève d'une tactique d'éco-blanchiment.

Et la suite? Entre institutionnalisation et expérimentation

À l'instar des mouvements sociaux, où c'est par la diversité des tactiques que les acteurs obtiennent des gains politiques, la synergie entre différentes stratégies est utilisée par les acteurs philanthropiques comme un moyen de contribuer plus efficacement à responsabiliser la finance face aux problèmes socio-écologiques. Suivant cette perspective, nous voudrions conclure en indiquant deux autres modes d'engagement qui, bien qu'actuellement négligés dans le répertoire d'action de la plupart des fondations, nous semblent néanmoins des plus prometteurs pour la suite : l'institutionnalisation et l'expérimentation.



De la même manière que les dons sont contraints de cadrer avec les fins de bienfaisance reconnues, la logique voudrait que les investissements soient tenus de respecter des pratiques élémentaires en matière de critères ESG.



Tout d'abord, en dépit de l'accroissement rapide du nombre de fondations dont la gestion du capital intègre *a minima* les facteurs ESG, beaucoup de chemin reste à faire pour que cette norme s'impose à la grandeur du secteur philanthropique. Des solutions complémentaires – et plus « radicales » – doivent

désormais être réfléchies pour accélérer cette mise à l'échelle de l'ISR à la majorité voire la totalité des fondations. Or, pour faire avancer une cause, vient un moment dans le parcours des entrepreneurs de morale où il devient nécessaire de se pencher sur le contenu des lois. La volonté de transformer durablement les normes relatives à un secteur d'activité ne peut faire l'impasse sur une possible révision des lois qui le régissent. Cette visée d'institutionnalisation représente, à notre avis, une prochaine étape déterminante de l'engagement des fondations en faveur de la finance durable. L'approche basée sur le volontariat et la bonne volonté de chacun révèle de plus en plus ses limites. Si on tient pour acquis que les investisseurs institutionnels – et en première instance ceux dotés d'une vocation publique – doivent faire preuve de responsabilité sociale et environnementale, le *statu quo* ne peut plus être maintenu en ce qui a trait aux règlements encadrant les activités d'investissement des organismes de bienfaisance. De la même manière que les dons sont contraints de cadrer avec les fins de bienfaisance reconnues, la logique voudrait que les investissements soient tenus de respecter des pratiques élémentaires en matière de critères ESG.

Enfin, la capacité des fondations à prendre des risques et expérimenter de nouvelles niches représente une autre piste d'action à ne pas sous-estimer. En effet, même dans la situation idéale où toutes les fondations administreraient leur portefeuille dans une optique « socialement responsable », cela n'épuiserait pas pour autant le potentiel de transformation sociale et économique que les fondations peuvent tirer de leurs capitaux. Les différentes pratiques qu'offre l'ISR (tamisage des placements, intégrations des critères ESG, activisme actionnarial, etc.) ne sont qu'un volet de la solution. Le marché émergent de l'investissement d'impact (aussi appelé finance sociale) doit lui aussi être considéré comme un pilier central de la construction d'une finance durable⁹. Il ouvre des opportunités permettant de sortir des capitaux de l'économie dominante – ISR y compris – et de les rediriger au bénéfice d'initiatives entrepreneuriales qui agissent sur différents fronts de la transition sociale et écologique : logement abordable, énergies renouvelables, mobilité durable, empouvoirement de populations marginalisées, économie circulaire, système alimentaire durable, etc.

Puisqu'il s'agit d'un marché financier jeune et toujours en construction, il rebute souvent à la plupart des investisseurs institutionnels. Les fondations sont bien positionnées pour prendre les devants, réaliser

des investissements à titre expérimental, évaluer les risques financiers et les retombées sociales. En cas de résultats concluants, elles pourront avoir un effet levier en amenant de plus grands joueurs de la finance à s'y intéresser.



Le marché émergent de l'investissement d'impact (aussi appelé finance sociale) doit lui aussi être considéré comme un pilier central de la construction d'une finance durable. Il ouvre des opportunités permettant de sortir des capitaux de l'économie dominante – ISR y compris – et de les rediriger au bénéfice d'initiatives entrepreneuriales qui agissent sur différents fronts de la transition sociale et écologique (...)



Notes

- 1 Fondations philanthropiques du Canada (2022), « Données relatives aux fondations canadiennes », pfc.ca [en ligne], URL : <https://pfc.ca/fr/donnees-relatives-aux-fondations-canadiennes/>
- 2 Pour une définition générale et opérationnelle de la finance durable : <https://observatoiredelafinancedurable.com/fr/presentation/la-finance-durable/>
- 3 Howard S. Becker, *Outsider : étude de sociologie de la déviance*, Les Éditions Métailié : Paris, 1985.
- 4 Millanie et PFC (2021). Enquête sur les placements et les versements 2018-2020. Récupéré de <https://pfc.ca/fr/documents/enquete-sur-les-placements-et-les-versements-sommaire-2018-2020/>
- 5 Association pour l'investissement responsable (2023), « Rapport de tendances de l'IR canadien 2023 », Récupéré de <https://www.riacanada.ca/content/uploads/2023/10/2023-Trends-Report-FR.pdf>
- 6 SHARE s'impose comme la principale référence des fondations en la matière. Pour plus d'informations sur sa mission et son offre de service : <https://share.ca/>
- 7 Pour plus d'informations sur le Championnat : <https://www.esgchampionship.ca/>
- 8 Pour consulter le rapport : https://esgchampionship.ca/wp-content/uploads/documents/winners/ESG_Etat_de_lindustrie_rapport_Fr.pdf
- 9 L'investissement d'impact réfère à des investissements directs au sein d'entreprises, d'organisations ou de fonds dans l'intention de générer un impact social positif et mesurable en complément des rendements. Dans le contexte québécois, cela se traduit entre autres par des investissements au sein d'entreprises d'économie sociale et solidaire. Un cahier de recherche du PhiLab a étudié en profondeur les interventions des fondations dans ce marché financier : David Grant-Poitras et Audrey Maria Popa, « L'essor de la finance sociale dans le champ de la philanthropie subventionnaire », PhiLab, 2023, Récupéré de <https://philab.uqam.ca/publication/essor-de-la-finance-sociale-dans-le-champ-de-la-philanthropie-subventionnaire/>



NAVIGUER LA POLITIQUE | NAVIGATING POLICY

Quelles leçons tirées d'une expérience de philanthropie basée sur la confiance ?

Par Marie-Andrée Farmer, Directrice des initiatives stratégiques et des partenariats communautaires à la Fondation du Grand Montréal



Fondation du Grand Montréal

Marie-Andrée Farmer travaille depuis près de 15 ans dans le milieu de la philanthropie en tant que responsable de programmes de financement en appui à la communauté. Elle s'intéresse particulièrement aux enjeux sociaux et aux collaborations nécessaires pour offrir un soutien approprié. Elle travaille présentement comme directrice des initiatives stratégiques et des partenariats communautaires à la Fondation du Grand Montréal.

La Fondation du Grand Montréal (FGM) est une fondation communautaire vouée au mieux-être de la collectivité du Grand Montréal. En collaboration avec ses partenaires, elle mobilise les ressources philanthropiques, diffuse des connaissances, catalyse des initiatives et soutient la communauté.

À titre de fondation communautaire, la [Fondation du Grand Montréal](#) (FGM) aspire à une collectivité exempte de pauvreté et de discrimination, où toutes

et tous peuvent réaliser leur potentiel et vivre dans un environnement sain, aujourd'hui et dans l'avenir. Pour contribuer à la réalisation de cette vision, la FGM cherche à réinventer ses pratiques et à renforcer ses collaborations afin de répondre plus adéquatement aux besoins de sa communauté et, ce faisant, soutenir l'émergence des changements concrets et durables dont elle a besoin.

Consciente des inégalités systémiques touchant les populations qu'elle sert, et particulièrement les populations marginalisées vivant à l'intersection de plusieurs de ces inégalités, la Fondation leur porte une attention spécifique et intentionnelle afin de soutenir la mise en œuvre de solutions appropriées. Elle s'efforce de comprendre les multiples facteurs contribuant aux inégalités, leurs interactions et leurs impacts sur la qualité de vie dans les collectivités. Les questions touchant la transition socio-écologique et l'adaptation aux changements climatiques, ainsi que

les enjeux de justice, équité, diversité et inclusion (JEDI) se situent à ce titre au cœur des réflexions de la Fondation. Pour mieux les comprendre et les faire progresser, cette dernière s'emploie à développer une approche collaborative, et s'appuie notamment sur les principes de la philanthropie basée sur la confiance et de la distribution participative afin de guider ses processus d'octroi de subventions.

Plus précisément, à travers une démarche intentionnelle et marquée par une écoute active et une volonté sincère d'apprendre, elle s'efforce d'atténuer les dynamiques de pouvoir inhérentes au modèle traditionnel de la philanthropie. Son objectif est de mettre les relations humaines et les besoins de la communauté au centre de ses actions. En développant des liens sincères, en cherchant à comprendre les préoccupations des milieux, en amplifiant les voix de personnes sous-représentées dans le milieu philanthropique, en partageant son pouvoir décisionnel avec le milieu communautaire et en faisant appel à son intelligence collective, la Fondation estime qu'elle pourra intervenir de manière plus pertinente, éclairée, transparente et légitime.

Dans le cadre de son [Plan stratégique 2022-2026](#), la FGM agit sur six thématiques : l'équité sociale, la transition socio-écologique, la diversité et l'inclusion ainsi que la culture, l'éducation et la santé. Par le biais d'une approche sous-tendue par ses valeurs JEDI, elle priorise par ailleurs plusieurs groupes et communautés historiquement marginalisés : les personnes noires, autochtones et racisées; celles vivant avec une limitation fonctionnelle physique ou intellectuelle; les femmes et les filles, ainsi que les personnes appartenant aux communautés LGBTQ2S+. La Fondation privilégie également les approches intersectionnelles et le soutien aux organisations « par et pour » les groupes visés, lorsque cela est possible.

Sachant également que les bailleurs de fonds n'ont pas toutes les réponses et ne peuvent rien accomplir seuls, les collaborations et les partenariats avec d'autres organisations des milieux communautaire, philanthropique et institutionnel sont également au cœur de sa stratégie d'intervention, notamment à travers ses propres programmes de subventions. La FGM s'appuie ainsi sur les connaissances et les expériences des différents partenaires avec lesquels elle collabore ainsi que sur celles des membres de son Comité de l'engagement dans la communauté, composé d'expert·e·s externes issu·e·s de toutes

les sphères de la collectivité du Grand Montréal. Au besoin, la Fondation met également sur pied des comités aviseurs qui se spécialisent dans les champs d'intervention où elle souhaite agir.



Les questions touchant la transition socio-écologique et l'adaptation aux changements climatiques, ainsi que les enjeux de justice, équité, diversité et inclusion (JEDI) se situent à ce titre au cœur des réflexions de la Fondation. Pour mieux les comprendre et les faire progresser, cette dernière s'emploie à développer une approche collaborative, et s'appuie notamment sur les principes de la philanthropie basée sur la confiance et de la distribution participative afin de guider ses processus d'octroi de subventions.



Étude de cas : Le Fonds Collectif pour l'équité sociale

Le [Fonds Collectif pour l'équité sociale](#) a été créé par la FGM en 2021, dans l'intention d'agir sur diverses problématiques ancrées dans les inégalités sociales

afin de faire progresser les enjeux de justice, d'équité, de diversité et d'inclusion à travers le territoire du Grand Montréal. En conséquence, la Fondation entend appuyer en priorité des organisations œuvrant auprès des populations historiquement marginalisées énumérées plus haut, afin de les aider à concrétiser leur vision transformatrice.

Avant de lancer l'édition 2023 de ce Fonds, et sur la base de ses échanges avec les milieux, la FGM a d'abord choisi un champ d'intervention : soutenir les organisations communautaires impliquées dans l'accueil des nouveaux arrivants et nouvelles arrivantes. La mise sur pied d'un comité aviseur participatif, composé de représentant·e·s de ces milieux, a été essentielle pour préciser les populations les plus vulnérables ainsi que les axes d'appui. Ont donc été priorisées les personnes demandeuses d'asile, réfugiées ou migrantes sans statut, à statut temporaire ou précaire, dans un contexte de sous-financement chronique des services communautaires qui les soutiennent.

Mais il ne s'agissait que de la première étape. Il fallait encore déterminer les paramètres du Fonds, tels que les conditions d'admissibilité et le format des subventions, et préciser les critères de priorisation de manière à trouver l'équilibre entre les capacités du Fonds et les besoins identifiés par le milieu. Pour ce faire, la Fondation s'est aussi tournée vers le comité aviseur participatif. Les membres de ce comité, en mettant en commun leurs expertises, leurs expériences et leurs vécus, ont identifié les modalités les plus propices à l'atteinte des objectifs du Fonds. C'est ainsi que trois axes de financement ont été retenus : l'accompagnement administratif ou juridique des personnes; les actions de plaidoyer visant à influencer les politiques publiques; et le renforcement du pouvoir d'agir des personnes et des communautés.

En parallèle, cette approche de concertation a aussi permis à la FGM de mobiliser davantage de ressources financières pour le Fonds. En discutant avec ses partenaires et d'autres bailleurs de fonds, des consensus ont émergé quant aux moyens et aux priorités d'action de chacun, ce qui a permis la mise en commun de certaines ressources financières, et donc, une plus grande efficacité et une meilleure capacité d'intervenir sur le terrain. En clair, cette marge de manœuvre supplémentaire a permis de rehausser le financement annuel accordé et rendu possible le soutien pluriannuel (2024 à 2026) dont bénéficieront

les organisations récipiendaires.

Les travaux du comité ont enfin permis d'identifier divers types d'organisations ou de regroupements qui, malgré la pertinence et la qualité de leurs services, passent souvent entre les mailles du filet de la philanthropie traditionnelle, dont la structure et la culture ne sont pas adaptées à leurs réalités. Pensons par exemple aux organisations locales de très petite taille, ou encore à des regroupements n'ayant pas le statut d'organisme de bienfaisance. La Fondation a entrepris des démarches délibérées afin de les inclure, et trouvé des moyens de contourner les problèmes administratifs qui auraient pu les empêcher de soumettre une demande et de recevoir du soutien.

Les membres du comité ont également agi comme catalyseurs du Fonds, en le faisant connaître dans leurs réseaux respectifs. Il s'agit là d'une autre façon de faire qui diverge des méthodes habituelles du milieu philanthropique et qui permet, par un effort collaboratif, d'élargir la portée d'un projet. Par ailleurs, en valorisant la contribution de ses partenaires et en approchant de manière proactive les organisations identifiées, l'équipe de la Fondation a pu établir un premier contact de qualité et initier une relation de confiance réciproque avec un grand nombre d'entre elles.



Rencontre d'équipe de la Fondation du Grand Montréal. © Fondation du Grand Montréal

Des conversations approfondies avec un grand nombre de ces organisations lui ont ensuite permis de mieux comprendre leur travail, leurs défis et leurs besoins, ainsi que la diversité, la complexité et l'intersectionnalité des enjeux vécus par les personnes auxquelles elles viennent en aide. Pour donner suite aux conversations, l'équipe de la FGM a entièrement pris en charge la rédaction des demandes de subvention, qui ont ensuite été approuvées par les organisations avant d'être déposées au comité. Cette approche, qui vise à remplacer les formulaires traditionnels devant être complétés par les organisations elles-mêmes, réduit le fardeau qui leur incombe et enrichit la relation qui se crée entre organisation et bailleur de fonds. En soi, cette réduction des exigences administratives contribue à soutenir les organisations ciblées, qui ont besoin d'affecter moins de ressources à ce type de tâches.

Finalement, c'est par le biais d'une réflexion collective et d'un processus de sélection par les pairs alimentés par les membres du comité avisé participatif que les organisations récipiendaires ont été choisies. Ces choix, qui demeurent tout aussi crève-cœur que nécessaires considérant les limites budgétaires auxquelles il est impossible d'échapper, ont ainsi pu être basés sur l'intelligence, la sensibilité et l'expertise de ses membres. En confrontant leurs opinions, leurs priorités et leurs visions, ces personnes ont démocratisé et renforcé le processus décisionnel de la Fondation.

À travers ces approches émergentes, la FGM fait le pari qu'il est possible, en travaillant de manière concertée avec un large réseau de partenaires et en bâtissant des relations basées sur la confiance et le partage de connaissances, de transformer les pratiques philanthropiques et de soutenir le milieu communautaire autrement que par le seul octroi de subventions.

Le projet n'est pas terminé pour la FGM, ni pour les organisations récipiendaires. Des mécanismes de suivi seront développés conjointement avec ces organisations, afin de s'assurer qu'ils correspondent aux besoins et aux capacités de tous. Les organisations seront aussi accompagnées par la FGM et invitées à échanger entre elles pour partager leur savoir-faire, leurs défis et leurs idées pour la suite des choses. La Fondation s'emploiera également, au cours des prochaines années, à bâtir et entretenir des relations de confiance réciproques avec les organisations

qu'elle a connues par le biais du FCES. Par conséquent, l'expérience de la philanthropie basée sur la confiance à la Fondation du Grand Montréal se poursuivra!



À travers ces approches émergentes, la FGM fait le pari qu'il est possible, en travaillant de manière concertée avec un large réseau de partenaires et en bâtissant des relations basées sur la confiance et le partage de connaissances, de transformer les pratiques philanthropiques et de soutenir le milieu communautaire autrement que par le seul octroi de subventions.





NAVIGUER LA POLITIQUE | NAVIGATING POLICY

National Nonprofit Sector Advocacy in the 2020s

By Cathy Barr, Vice-President, Research & Strategic Relationships at Imagine Canada¹



IMAGINE
CANADA

Cathy Barr is Vice-President, Research & Strategic Relationships at Imagine Canada. For more than twenty years, she has led data, research, and knowledge mobilization projects focused on Canada's charitable sector. She has also been involved with Imagine Canada's policy activities. Cathy has a Ph.D. in political science from York University.

The past few years have been busy ones for charities and nonprofits engaged in advocacy at the federal level. As the only national organization that seeks to represent the interests of the charitable and nonprofit sector as a whole, Imagine Canada has been at the forefront of this activity. This is not always an easy place to be. Canada's charitable and nonprofit sector is large and diverse. It includes public and private foundations, registered charities, incorporated nonprofits, unincorporated groups, exceptionally progressive organizations, and deeply conservative ones. Not surprisingly, these organizations often have different views on the public policy goals Imagine Canada should proactively pursue and how it should

respond to policies proposed by others. Both the complexity of the sector and Imagine Canada's unique position within it were highlighted during recent debates on increasing the disbursement quota and granting to non-qualified donees. This article discusses Imagine Canada's role in relation to these recent policy issues and reflects on what these experiences tell us about the nonprofit sector and national advocacy in the 2020s.

Increasing the Disbursement Quota

The disbursement quota (DQ) is the minimum amount charities must spend each year on their own charitable activities, gifts to qualified donees, and, since 2022, grants to non-qualified donees.² The concept of a DQ for private foundations was introduced in 1976 and set at 5% of assets not used for charitable activities or administration; in the 1980s, it was extended to public foundations and lowered to 4.5%.³ In 2004, it was lowered to 3.5%. The idea of increasing the DQ gained traction in 2020 as a way to help charities struggling with the impact of the COVID-19 pandemic. The

leading proponent of the proposal was John Hallward, founder of GIV3, who argued that the DQ should be increased to 10%.⁴

Imagine Canada did not actively lobby for an increase in the DQ. Its view was that increasing the DQ was not the best way to help the sector at a time of crisis because its impact would not be immediate, and it would benefit only qualified donees. It was also concerned that sufficient analysis had not been done to inform decision-making on the issue and that organizations with restricted endowments could be placed in a difficult legal position. As the date of the federal budget approached, however, Imagine Canada was being repeatedly asked about its position. In response, it issued a statement outlining its thoughts and calling for consultations “with sector representatives to explore both intended and unintended consequences, and thoroughly review policy options.”⁵



In Budget 2021, the federal government announced it would launch consultations on increasing the DQ. For the next year, the debate about the DQ consumed a substantial portion of the sector’s advocacy resources. On one side of this debate were those, like Hallward, who argued that the assets of foundations had increased significantly in recent years and that they should be required to disburse a larger proportion of those assets. On the other side, were those who claimed that a major increase to the DQ would threaten the long-term sustainability of foundation endowments without leading to any significant redistribution of philanthropic dollars.⁶ The debate included nuanced arguments about the concept of perpetuity⁷ and the complicated relationship between philanthropy and economic inequality.⁸ It also featured a grassroots campaign and street protest that claimed foundations were hoarding assets, and it was time to #movethemoney.⁹

To develop its formal submission to the consultation, Imagine Canada consulted charity lawyers and academics; spoke to the leaders of foundations, operating charities, and nonprofits without charitable status; and examined regulations in other countries. It also analyzed 11 years of data from Registered Charity Information Returns (T3010). The result was a 36-page submission that recommended a scaled DQ based on asset size, a periodic review of the DQ grounded in the principle of intergenerational justice, the allocation of resources to identify the causes of T3010 completion errors, and improved transparency and accountability measures relating to disbursements.¹⁰ In Budget 2022, the government announced that the DQ would be increased from 3.5% to 5% on assets over \$1 million. It also committed to reviewing the policy after five years and improving the collection of information from charities. The new rules came into effect on January 1, 2023.

Reforming the Rules around Granting to Non-Qualified Donees

In the same budget that announced the increase to the disbursement quota, the government also announced its intention to amend the *Income Tax Act* to allow charities to fund non-qualified donees. This was a longstanding irritant for some charities, particularly those working internationally.¹¹ The issue was that charities could not grant to non-charities unless they entered into an agreement by which they exercised “direction and control” over the activities of their non-charity partner. This hindered the development of equitable partnerships between charities and non-charities, an issue that was increasingly recognized as problematic both internationally and domestically. Moreover, because establishing and demonstrating direction and control was difficult and costly, few charities were willing to fund non-charities. This was widely viewed as contributing to the underfunding of Black, Indigenous, and other equity-seeking groups.¹² The issue gained traction during the COVID-19 pandemic, which highlighted both the challenges facing many equity-seeking communities and the existence of “charity deserts”—areas that are underserved by registered charities. It was also frequently raised during the debates on the disbursement quota because, without a change to the rules around granting to non-qualified donees, many organizations would not benefit from an increase to the DQ.¹³

It was against this backdrop that Imagine Canada, along with several other leading organizations and charity lawyers, worked with Senator Ratna Omidvar to develop Bill S-216, the *Effective and Accountable Charities Act*. Bill S-216 passed the Senate in December 2021 and was introduced in the House of Commons by Conservative MP Phillip Lawrence in February 2022. Then, in a surprise move, the government announced in Budget 2022 that it planned to amend the *Income Tax Act* to allow charities to fund non-qualified donees. The announcement explicitly stated that the government's intent was to implement "the spirit of Bill S-216."¹⁴ Those who had supported Bill S-216, including Imagine Canada, were cautiously pleased by this move. However, when details of the proposed changes were released in the Budget Implementation Act (BIA), pleasure turned to dismay. The government's proposed changes not only retained the most troubling aspects of the existing regulations but created additional issues.¹⁵



Working with Senator Omidvar and others, Imagine Canada quickly organized a lobbying effort aimed at securing amendments to the BIA. The timeline was extremely tight, and the group was warned that obtaining changes to the BIA would be difficult, so it responded with one of the strongest advocacy efforts the sector has ever mounted. The campaign involved dozens of meetings over several weeks, but the focus was a three-day period in early May when representatives of 12 organizations (both charities and non-charities) worked in small groups to meet with more than two dozen MPs from all parties.¹⁶ Shortly thereafter, Imagine Canada's President and CEO, Bruce MacDonald, spoke to the House of Commons Standing Committee on Finance, the body responsible for making any amendments to the BIA. On May 30,

the committee voted in favour of two of the group's three suggested amendments. On June 23, the new rules became law.

Although this outcome was described as a "major victory" for the sector,¹⁷ the work was not—and is not—over. In late 2022, the Canada Revenue Agency issued its draft Guidance for "registered charities making grants to non-qualified donees" and invited comment. Several organizations, including Imagine Canada, responded to this opportunity, providing significant feedback on problematic aspects of the Guidance.¹⁸ And for the next several years, it will be important to analyze the data to see if the changes are leading to a more equitable funding environment in the sector.

Conclusion

The debates around these two issues highlight the increasing complexity of Canada's charitable and nonprofit sector, as well as the challenges the sector faces in engaging in policy development and advocacy. The increasing complexity is a positive change as it is the result of the growing sophistication and diversity of the sector. Although it makes national advocacy more challenging, it also presents an opportunity to create a more equitable sector and society. There is a long way to go, however, before Imagine Canada achieves its goal of a Canada "where government considers the contributions and needs of charities, nonprofits and social enterprises when public policy, funding programs, legislation and regulation are being developed and implemented."¹⁹ Too often still, policies are introduced with no consideration for their impact on charities.²⁰ In addition, the small gains the sector makes are still often "on the chopping block" the moment the government moves into fiscal restraint mode. But advocacy is a long game, and the sector is getting better at it. Last year, for the first time, a diverse group of leaders from across the sector came together and agreed on four policy priorities: (1) a home in government, (2) a labour-force strategy, (3) more and better data, and (4) improved federal funding levels and practices.²¹ Sector leaders advanced these priorities in their submissions to the 2024 pre-budget consultation process and in meetings held during the sector's annual lobby day. Plans are currently in the works to repeat the exercise this year. Muscles get stronger the more they are worked, and the sector is working its advocacy muscles more frequently and cohesively than ever before.

Notes

1 The author thanks Bernadette Johnson and Bruce MacDonald for their comments on an earlier draft of this article.

2 Qualified donees are organizations that can issue official donation receipts. They include registered charities and several other types of organizations such as registered amateur athletic associations, registered journalism organizations, registered municipalities, and others. Non-qualified donees are organizations that cannot issue official donation receipts.

3 Government of Canada. (2021). [Backgrounder for Disbursement Quota Consultation](#).

4 Hallward, J. (2020, May 20). "[Unlocking the expanding wealth of charitable foundations](#)." *Policy Options*.

5 Imagine Canada. (2021, March 16). [Imagine Canada's position on an increase to the disbursement quota](#). Interestingly, some people took this statement to mean that Imagine Canada was opposed to an increase in the DQ, leading it to issue a clarification a few months later.

6 Pearson, H. (2021, October 5). "[The federal government should not overhaul charities rules during a pandemic](#)." *Policy Options*.

7 PhiLab Newsletter. (2022, April). [Philanthropy and Perpetuity](#).

8 Jacques, T. (n.d.). "[Federal budget reflections: the disbursement quota](#)." *MakeWay*.

9 Oatley, G. (2021, November 4). "[Tired of 'siloed' conversations, Justice Fund protest brings disbursement quota advocacy to the street](#)." *Future of Good*.

10 Imagine Canada. (2021). [Consultation: Boosting charitable spending in our communities—Recommendations submitted by Imagine Canada](#).

11 Lorinc, H. (2015, April 6). "[The problems with 'direction and control'](#)." *The Philanthropist Journal*.

12 Harper, T. (2022, March 21). "[Will eliminating 'direction and control' close the funding gap?](#)" *The Philanthropist Journal*.

13 Not everyone was in favour of changing the rules. One prominent opponent was Bob Wyatt, the

executive director of the Muttart Foundation. Wyatt was concerned about who would be accountable for ensuring that funds were spent on charitable activities and argued that it would be preferable for Canadian non-qualified donees to become registered charities. See Harper, T. (2022, February 9). "[Bill introduced in House of Commons to remove 'direction and control'](#)." *The Philanthropist Journal*.

14 Government of Canada. (2022). *Budget 2022: A Plan to Grow Our Economy and Make Life More Affordable*, p. 195.

15 Harper, T. (2022, May 12). "[For the philanthropic sector, a step forward on 'direction and control,' but more work ahead](#)." *The Philanthropist Journal*.

16 See Imagine Canada. (2022, May 13). [Nonprofits brief MPs on impact of key legislation](#) and Imagine Canada (2022, July 11). [Running up that hill: Exerting influence on the legislative process](#).

17 Harper, T. (2022, May 31). "[Philanthropic sector 'relieved' with key victory at Commons committee](#)." *The Philanthropist Journal*.

18 Imagine Canada. (2023, January 31). [Response to CG-032 Registered charities making grants to non-qualified donees](#). See also Imagine Canada. (2023, March 14). [Our take on the new CRA guidance about funding non-charities](#).

19 Imagine Canada. (2021). [Strategic Planning Framework](#), p. 7.

20 The proposed changes to the Alternative Minimum Tax introduced in announced in Budget 2023 are the most recent example of this. Two of the changes would reduce incentives for charitable donations.

21 Harper, T. (2023, June 20). "[Sector seeks consensus and a louder voice in Ottawa](#)." *The Philanthropist Journal*.





NAVIGUER LA POLITIQUE | NAVIGATING POLICY

Power in Community

By **Bruce W. J. Miller**, *Interim Team Lead, for the Indigenous Peoples Resilience Fund*; **Jess Housty**, *Indigenous writer*; **Sophie Kirby**, *Legislative Assembly Advisor – Social Programs for the Northwest Territories Legislative Assembly*



Bruce W. J. Miller (Anishinabeg) is a member of the Matachewan First Nation in the Treaty #9 area and is the interim Team Lead, for the Indigenous Peoples Resilience Fund. Mr. Miller has worked in post-secondary education, not-for-profit, and major games and lives in Winnipeg Manitoba in the Treaty #1 Territory and the homeland of the Metis Nation.

Bruce is an alumnus of the University of Manitoba. Mr. Miller enjoys volunteering in sports, major games, education, and the philanthropic sector. Mr. Miller was publicly appointed by the Government of Manitoba in 2017 as a member of the University of Winnipeg's Board of Regents. In 2023, Bruce was reappointed as Vice-Chair of the University of Winnipeg Board of Regents for another term till 2026. Bruce also serves as Vice-Chair of the Governance and Community Relations Committee and vice-chair of the Executive Committee and sits on the Honorary Degrees and Distinguished Alumni Committee. Bruce also sits on the University of Manitoba Distinguished Alumni Awards Selection/Gala Committee. Bruce was also recently appointed to the University of Winnipeg Foundation board.

Jess Housty is a queer and neurodivergent Indigenous writer, land-based educator, and community organizer with deep roots in Indigenous non-profit work and a strong desire to disrupt the power imbalances and structural inequity inherent in conventional philanthropy. They serve as a Co-Lead of the Right Relations Collaborative.

Currently living and working in Yellowknife, **Sophie Kirby** moved to the Northwest Territories in 2016. Sophie is a graduate from the University of Saskatchewan and the UiT the Arctic University of Norway with a Joint Master of Governance and Entrepreneurship in Northern and Indigenous Areas. Her Masters thesis was focused on analyzing and understanding grantee-funder relationships in the Northwest Territories, and whether a trust-based philanthropy approach could help strengthen those relationships and mitigate power imbalances. Sophie is currently working as a Legislative Assembly Advisor – Social Programs for the Northwest Territories Legislative Assembly, previously working as the Executive Director of the Yellowknife Community Foundation.

There have been increasing discussions across the philanthropic sector on evaluating the usual power dynamics within grantee-funder relationships and the grantmaking space, as well as analyzing the accessibility of grants and funding¹. Organizations are continuously facing challenges related to securing, maintaining, and increasing funds, which may be attributed to grantmaking processes that have outdated policies and funders that have not taken the opportunity to evaluate their position in grantmaking. Existing grantmaking mechanisms and power imbalances can establish hurdles for partnership and objective building between funders and grantees, often continuing to perpetuate inequities from conventional grantmaking.²

There are examples across Canada's philanthropic sector of organizations that are changing the landscape of grantmaking and shifting the usual power dynamics³. We had the opportunity to interview two of these - the Council of Indigenous Aunties at the [Right Relations Collaborative](#) and the [Indigenous Peoples Resilience Fund](#). They shed light and give us first-hand experience on their community-centred initiatives that are changing the narratives on traditional power dynamics in the grantee-funder relationship. Both are building their grantmaking processes and programs with the interest of their communities at the helm. These two funders help set the stage for innovative approaches to giving, grantmaking, and policy development within the philanthropic sector.



Indigenous Peoples Resilience Fund

The Indigenous Peoples Resilience Fund (IPRF), was built upon the resiliency of and guided by Indigenous people and offers funding to Indigenous-led initiatives and programs across Canada⁴. Upon review of their grantmaking processes and in conversation with their

interim Team Lead, Bruce Miller, the IPRF created their grant criteria in collaboration with their communities and as Miller described, to “support the demonstrating need in our community”. In fact, the only restriction IPRF has on their grant opportunities, according to Miller, is that - “we fund culture”. The Fund was created during the COVID-19 pandemic, in response to the need to establish a funding opportunity that was rooted in the voices of their communities. Bruce elaborates:

“We say...that... our pillars of work are really based on [the fact] that community knows what community needs and we meet community where communities [are]. [We] certainly respect and support the self-reliance and community reliance or resilience of the community.”

The development of IPRF was also an “unintended outcome” of the [Philanthropic Community's Declaration of Action](#) (The Declaration). The Declaration is “meant to be signed by philanthropic organizations who wish to make a commitment to using their philanthropic resources in service to Reconciliation”⁵. In the creation of the Declaration, Miller raised questions about the role of the philanthropic sector in reconciliation:

“What role can philanthropy play in the necessary healing and reconciliation in this country to be more just, inclusive and equitable? And so we suggested in that Declaration of Action that we all need to participate in reconciliation and for the philanthropic world, it really is about sharing their resources, their networks and new ways of thinking.”

Evaluating the role of the philanthropic sector in reconciliation also creates a platform to analyze the power dynamics embedded within the grantee-funder relationship, and most importantly with Indigenous communities. Miller noted: “one of the biggest global trends that we noticed in Indigenous-focused philanthropy is the redistribution of wealth”.

He highlighted that wealth and power are intimately intertwined, and that taking a deeper look at that correspondence can change the traditional way we see the distribution of funds through grantmaking.

The principles of power, culture, and community-sharing are embedded within IPRF. Increasing the accessibility of funds to Indigenous-led initiatives across Canada is catching the attention of many current and potential partners helping to build the Fund. When asked how their approach to grantmaking is reflected in their organization's policies, Miller described:

"I think the biggest thing that we want to do is embed Indigenous cultural worldviews into philanthropic practices... [such as] the concept of Indigenous reciprocity, but also in our investment... So in the case of the investment policy statement, it is embedded or reflected in the concept of the Seven Generations principle... So, the concept that in our investment policy statement and our resources, we'll be looking at them as if we were out on our traditional family lands: That we only take what we need and share the rest with others."

Through policy development and the values of their organization, the IPRF has set practices that reflect Indigenous ways of being. Developing innovative partnerships, creating policies that increase the accessibility and continuity of funding, and transferring capital to community, are all key examples of shifting power in philanthropy. Their policy development is deeply thought for future generations, and as Miller emphasizes about the inception of IPRF: "It was the meeting of the minds at the time that we were able to do something [that] was very transformational in the transfer of both power and capital to community".

This enlightening and important conversation with the IPRF showcased an example of innovation, care, and community-centred thinking in the design of funding structures. As encouraged by Miller: "We want people to shift their thinking, so we're in the shift-thinking business, I guess!"

Right Relations Collaborative – Council of Indigenous Aunties

A goal of the Right Relations Collaborative is to bring together funders to challenge their perspectives and enter "into long-term, power-balanced relationships within the Collaborative."⁶ The Council of Indigenous

Aunties (the Aunties), the "governance backbone" of the Right Relations Collaborative is inviting funders to join their engagement framework to evaluate funders' position in today's philanthropic sector and their relationship with Indigenous communities⁶. Funders apply to the engagement framework (an exercise not always familiar by funders) and are evaluated and invited by the Aunties to join the Collaborative in agreement to "put in the work". This approach "flips the script" on conventional and traditional philanthropy. During this interview, Jess Housty, co-lead of the Rights Relations Collaborative, describes their approach to philanthropic giving:

"We invite funders essentially to apply for the privilege of giving money to Indigenous organizations. That happens through an engagement framework. So, the entry point for funders to come into this work with us as they fill out the engagement framework is to answer questions about their money story, the origin of their wealth, their relationship to Indigenous grantees and Indigenous people where they live, [and] their understanding of the Truth and Reconciliation (TRC) calls to action."

The process described by Housty puts onus on the funder, instead of the recipient organization, who are far too often responsible for applying, acquiring, and managing funds. The perpetual pattern of applying and reapplying for funds to sustain or grow

essential programming is something that is intimately experienced by organizations, while also continuing to meet the sometimes-unrealistic expectations of funders. This pattern is often referred to as the non-profit starvation cycle¹. Moreover, traditional approaches to grantmaking may not allow for an understanding of the realities of the sector, and more importantly the realities of the communities. All in all, a shared understanding, as demonstrated through the practices of the Rights Relations Collaborative, reimagines the power dynamics rooted in traditional philanthropy.

When asked how their grantmaking process is supported by policy within their organization, Housty expresses:

“This is fairly new work. We’ve been doing it since 2020 and we have been very practice driven and very values driven. So we’re in a place where things have developed very organically, very quickly with a set of practices and behaviors that are driven by the values and the vision set by the Aunties Council. Not everything is necessarily codified, and [we don’t have] policies that we can share with people to say these are the mechanics of how we do a thing, but I would say that that sort of visioning and moral authority-setting takes place with the Aunties Council. Much like we’re trying to have a relational approach to the funder side, we’re also trying to have a relational approach with the Indigenous community side.”

Housty emphasized that the Aunties Council is growing “at the speed of trust” with their partnerships and growing with intention in their practices. The Aunties Council is forging the path for innovative philanthropy, and it is important for them to “show up authentically” and “provide core support” to the people and organizations they serve. Housty also describes the power dynamic shift within their practices, and in particular:

“Capitalism inherently favors the people who have money in their power dynamics. I think that’s been a really interesting shift to make and a really big mental shift for myself. I think for everybody at the table at the Right Relations Collaborative [the question] is how to shift from your city mindset and a competition mindset to an abundance mindset and then a kinship-oriented mindset.”

The work of the Aunties Council is to disassemble traditional power structures and engage funders who

are ready to become responsible in their reconciliation and decolonize their perspectives of giving. In this same vein, Housty demonstrates questions that funder organizations can ponder when beginning to understand their position of power: “My first question is always how much power are you willing to cede? And I think that’s a really important, honest starting place that people need to think about.”

The Indigenous Peoples Resiliency Fund and the Right Relations Collaborative are both key examples of how we can shift power in philanthropic giving and grantmaking practices. Both organizations are investing in the resilience of their people and display changing perspectives and transformations in our traditional philanthropic systems. It is time that we look to these organizations as pillars of systems redesign that put community at the centre.



Notes

- 1 Hunnik, O., de Wit, A., Wiepkin, P. (2021). (In) equality through unrestricted grantmaking: Examining trust and power in collaboration between the Dutch charity lotteries and their grantees. *The Foundation Review*, 13(2), 38-51.
- 2 Wong, N., & McGrath, A. (2020). Building a trust-based philanthropy to shift power back to communities. *Stanford Social Innovation Review*.
- 3 Wong, N., & McGrath, A. (2020). Building a trust-based philanthropy to shift power back to communities. *Stanford Social Innovation Review*.
- 4 Indigenous Peoples Resilience Fund. (2022). [Our Story](#).
- 5 The Circle. [The Philanthropic Community's Declaration of Action](#).
- 6 Eaton, S. Right Relations Collaborative. [Our Story](#).

COMPTES-RENDUS DE LECTURE | BOOK REVIEWS



COMPTES-RENDUS DE LECTURE | BOOK REVIEWS

Philanthropic Foundations in Canada – Landscapes, Indigenous perspectives and pathways to change

Edited by Peter R. Elson, Sylvain A. Lefèvre and
Jean-Marc Fontan

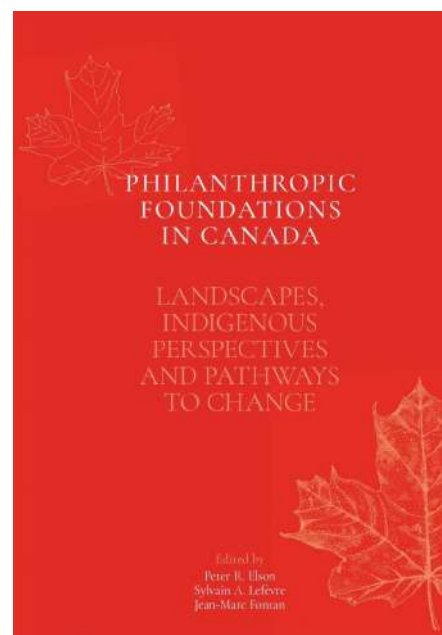
An understanding of the history, role, activities and impact of grantmaking foundations in Canada has never been more important. With media attention on the policy influence of foundations, the growing number of mega-foundations and the recent release (in 2018) of the shackles on non-partisan political activities, observers are starting to ask some very important and pertinent questions about grantmaking foundations. The story of these foundations, as profiled in this book, reflects, in our view, a turning point in the life-cycle of Canada's philanthropic landscape. There is still much to learn about grantmaking foundations in Canada, but there is now a considerable amount that is known, and this book is a testament to the new and ground-breaking knowledge that reflects a distinct Canadian foundation sector.

Within these pages you will hear the fresh voice of younger people who are part of the foundation ecosystem as well as the seasoned voice of experience. Although this book has been nurtured in an academic context, it is dominated by authors who are active, engaged and thoughtful practitioners. As such, they have much to share, and do so with enthusiasm and skill, and with the desire to share what they have learned with their fellow foundation leaders,

academics and grant recipients. We are delighted to have contributions from foundation leaders and community-focused academics who bring an openness, candour and reflexivity to their writing – some of the most challenging questions come from within the sector itself. Grant recipient partners and other contributors provide an in-depth analysis of some recent trends in the foundation sector which are as interesting as they are challenging.

Happy reading!

Get your free PDF version [here](#), and find the e-book and print versions on [Amazon](#), [Barnes&Noble](#), and [Kobo](#).



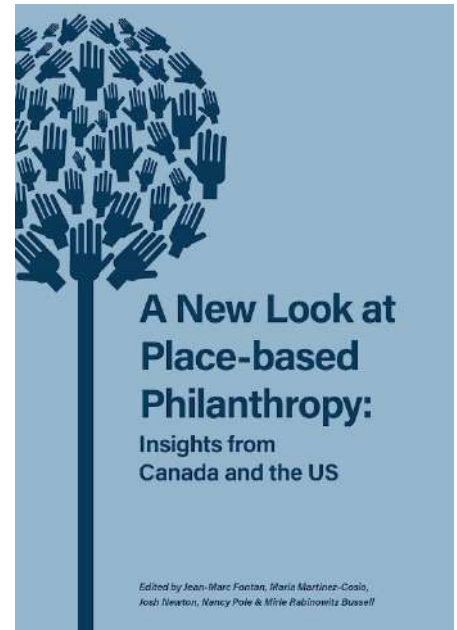
COMPTES-RENDUS DE LECTURE | BOOK REVIEWS

A New Look at Place-based Philanthropy Insights from Canada and the US

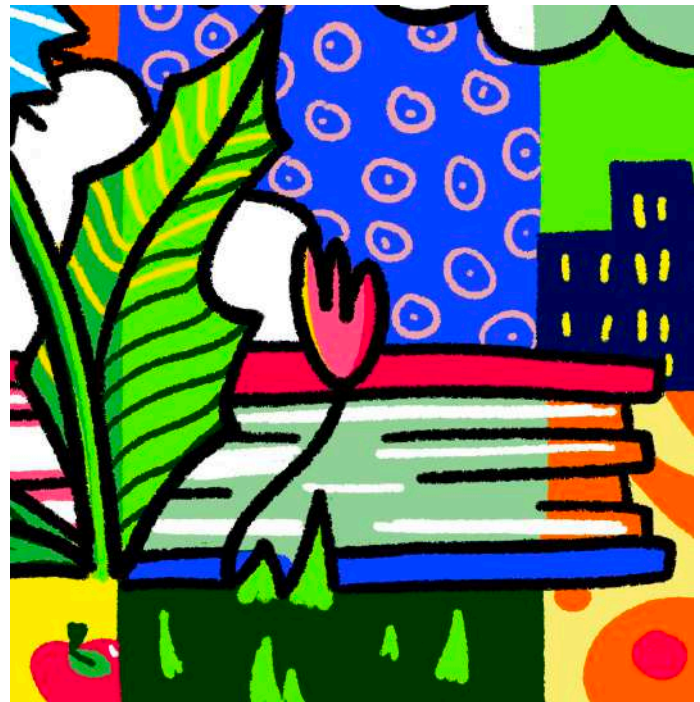
By Jean-Marc Fontan, Maria Martinez-Cosio, Josh
Newton, Nancy Pole, and Mirle Rabinowitz Bussell

In this edited volume, the authors present rich case studies of place-based philanthropy in the United States and Canada that make a strong conceptual and empirical argument for the importance, and growing imperative, of place-based philanthropy in 2023 and beyond. Offering a multidisciplinary theoretical grounding in the connection between philanthropy and place, the case studies range from foundations engaged in disaster recovery, a First Nations UNESCO site, to a funder collaborative engaging seven philanthropies targeting 30 neighborhoods in Montreal, and a private foundation developing a model for holistic change that is being replicated in underserved communities throughout the U.S, among others. Collectively, the case studies bring into the conversation the meaning that individuals bring to their spaces as members of diverse communities, as public and private actors seeking to effect change in underserved communities, and the tension that may result as place is redefined through philanthropic work. The themes and lessons learned that emerge from the case studies offer insights for practitioners, scholars and students of philanthropy.

Happy reading!



Find the e-book [here](#).



COMPTES-RENDUS DE LECTURE | BOOK REVIEWS

From Charity to Change Inside the World of Canadian Foundations

By Hilary Pearson

This is a more personal post than usual. It's about Canadian foundation philanthropy, as may of my posts are. But it is also sharing some of my personal reflections as I look forward to the publication at the end of November of my book *From Charity To Change: Inside The World of Canadian Foundations*.

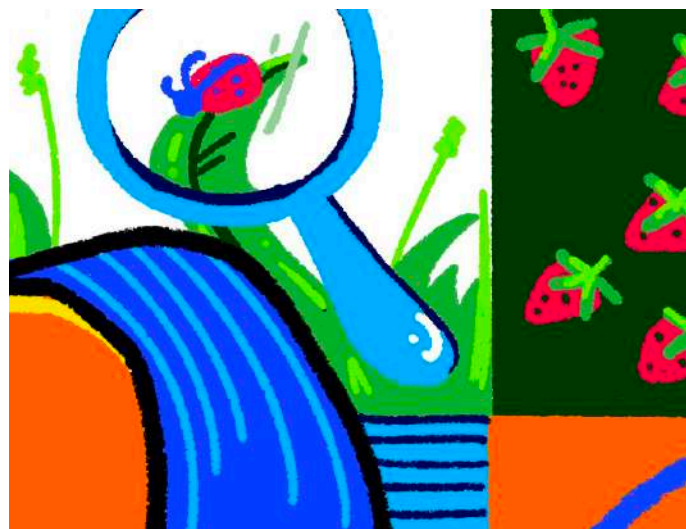
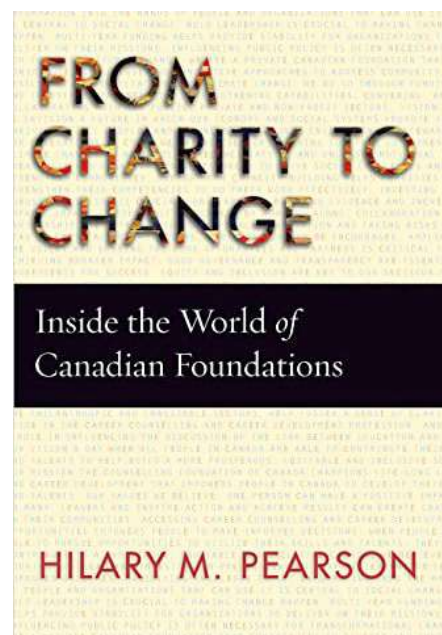
Why did I write a book about Canadian foundations? It's something that I have thought about for fifteen years, although the writing took only two. Over those fifteen years, I have seen a lot of change in the foundation world. Some of it was driven by outside events. Some of it built on the connections and inspirations provided by the growth of personal and digital networks. Some of it has come through internal change as foundations have learned from their own experiences. There has been enough change to make an interesting story that I thought worth telling.

This book is based on stories of individual foundations. But it is also a story about a story itself. One of the reasons I felt compelled to write was that I had been working on telling a good story about the role of foundations for many years. Of course, I should say immediately that generalized narratives about foundations founder quickly on the diversity of foundation behaviours and actions. It's difficult and

inaccurate to say that all foundations play a specific and similar role beyond that of provider of capital for social good.

Happy reading!

Find the longer review [here](#) and e-book [here](#).



COMPTES-RENDUS DE LECTURE | BOOK REVIEWS

État des lieux sur la philanthropie subventionnaire québécoise

Sous la direction de Diane Alalouf-Hall,
Caroline Bergeron et Jean-Marc Fontan

Dans l'opinion publique comme dans le domaine scientifique, la définition de la philanthropie est loin d'être univoque. Cet ouvrage présente les résultats de recherches menées entre l'été 2018 et l'été 2021 sur différentes dimensions de la philanthropie subventionnaire québécoise. Elles s'inscrivent dans le programme général de travail mis sur pied par le Réseau de chercheurs universitaires et de partenaires de l'écosystème philanthropique québécois.

Divisés en trois parties, les différents chapitres qui composent État des lieux sur la philanthropie subventionnaire québécoise contribuent à l'approfondissement des connaissances du milieu philanthropique québécois et introduisent des perspectives nouvelles, dont le regard autochtone. Plusieurs spécialistes se penchent sur les modalités de gestion des organisations philanthropiques, et surtout, portent une attention critique sur l'effet des interventions de fondations subventionnaires.

Cet ouvrage apporte un éclairage à la fois de base et spécialisé sur un secteur hétérogène qui demande à être mieux connu. Il s'adresse à des personnes actives dans le secteur philanthropique, intéressées par ce dernier ou en interaction avec des organisations de bienfaisance ou des fondations subventionnaires.



Bonne lecture!

Disponible en version papier et électronique
[ici.](#)



OUTILS | TOOLS





Formations en philanthropie

Base de données

Le PhiLab a toujours été préoccupé par la formation de la prochaine génération de chercheur·e·s en philanthropie. De l'inclusion des étudiant·e·s dans les projets de recherche, au soutien apporté à la réalisation de leurs projets de maîtrise ou de doctorats, à l'offre de prix et de bourses de reconnaissance de leur implication au sein de notre Réseau de recherche, l'éducation formelle autour du thème large de la philanthropie est au cœur de nos préoccupations.

Maintenant qu'en est-il des opportunités de formation pour les professionnel·le·s de la philanthropie au Canada ? Quelles organisations ou institutions, académiques ou professionnelles, offrent des cours ou des programmes sur le secteur qui sont propices à la formation aux différents métiers présents dans le secteur ? Comment se présente le paysage éducatif actuel dans le domaine de la philanthropie ?

Ces questions nous ont conduit à l'élaboration d'une base de données qui présente l'offre de formation disponible au Canada. L'objectif de cette base de données est de montrer la diversité de l'offre formative et de fournir un outil permettant de naviguer facilement pour repérer la ou les formations recherchée·s. Ces formations peuvent être réalisées en ligne ou en présentiel. Elles peuvent être de nature académique ou appliquée, encadrées ou autogérées.

Afin de présenter le format de cette base de données, vous trouvez ci-dessous, une sélection aléatoire de 10 offres de formation. Pour identifier la ou les formations qui vous intéressent, nous vous encourageons à utiliser les nombreux filtres mis à votre disposition et l'outil de sélection de critères à retenir pour effectuer votre recherche.

Étant donné la constante évolution de l'offre formative en philanthropie à l'échelle canadienne, notre base de données demande d'être régulièrement mise à jour. Pour nous aider dans le travail de repérage d'offres de formation périmées ou la présence de nouvelles offres formatives, nous vous invitons à nous signaler toute formation obsolète ou toute nouvelle offre formative. Si vous avez des informations à partager, nous vous invitons à compléter le [formulaire sur cette page](#).

Bonne recherche!

Vous pouvez accéder à la base de données des formations en philanthropie [ici](#).





Philanthropic Training in Canada Database

We are happy to present you with our Philanthropic Training in Canada Database!

PhiLab has always been dedicated to training the next generation of philanthropy researchers. From including students in each research project, to offering recognition bursaries and awards, formal education around the broad theme of philanthropy is one of our key values.

But what of training opportunities for philanthropic professionals in Canada? Which institutions, academic or professional, offer courses and programs that can train the current and next generation of nonprofit professionals? What is the current educational landscape for Canadians in the philanthropic space?

These questions led to the development of the current database: a collection of available training opportunities available to Canadians, be it online or in-person, academic or professional, self-guided or not. PhiLab's goal was to map out current learning opportunities for the sector.

Below you will find a random selection of 10 training opportunities. To see more options, we encourage you to use the many filters and criteria selection tool to find the right training opportunities for you.

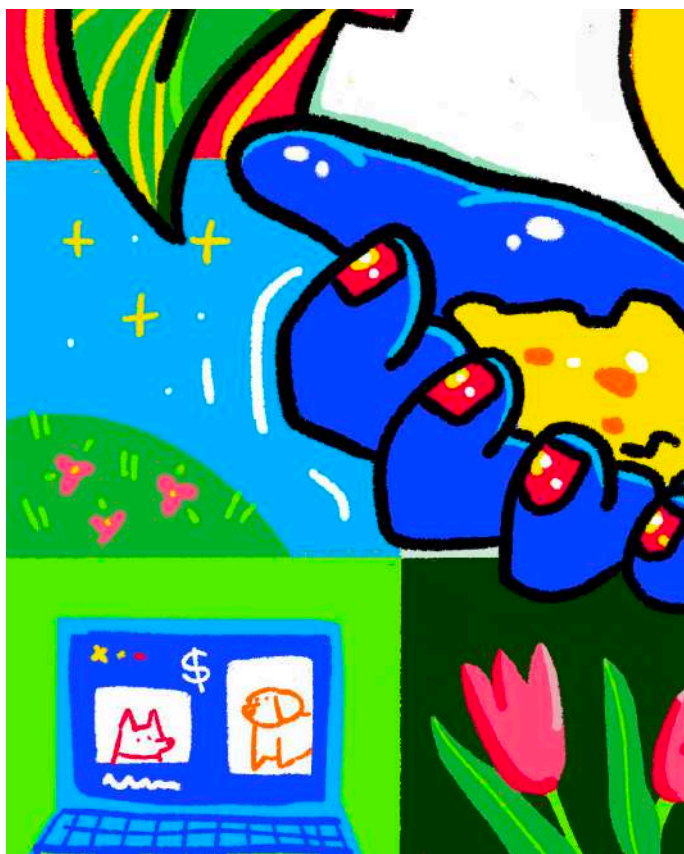
Given the ever-changing nature of learning opportunities, this is a snapshot in time that might not reflect today's availabilities. We will depend on the community to share any missing opportunities or updated information to keep this database alive.

If you have information to share to improve our Philanthropic Training in Canada Database, [please fill](#)

[out the form on this page](#). You can also contact us at philab@uqam.ca.

Enjoy your research!

You can access the philanthropy training database [here](#).





Un Wiki dédié aux termes essentiels de la philanthropie

Pourquoi faire un glossaire sur la philanthropie?

Le PhiLab a produit ce glossaire afin de favoriser le partage de la terminologie entre les étudiants, les chercheurs et les autres parties prenantes liées à la philanthropie. De plus, ce glossaire est le premier glossaire de ce type réalisé dans un contexte canadien, en français et en anglais.

Qui a écrit les définitions?

Les définitions ont été recensées de divers glossaires d'organisations et gouvernementaux existants. L'autorisation d'utilisation des définitions dans leur intégralité a été obtenue pour certaines définitions, l'usage des guillemets est alors employé pour celles-ci. Les autres définitions ont été paraphrasées par l'équipe du projet. Afin de respecter les droits d'auteur des définitions employées intégralement ou paraphrasées, la source apparaît à la suite de chacune des définitions.

Est-ce les mêmes sources pour les définitions françaises et anglaises?

Oui, les définitions ont d'abord été sélectionnées et selon le cas paraphrasé dans la langue de la source. Elles ont par la suite été traduites sans que la source diffère.

Comment avez-vous choisi quels termes inclure?

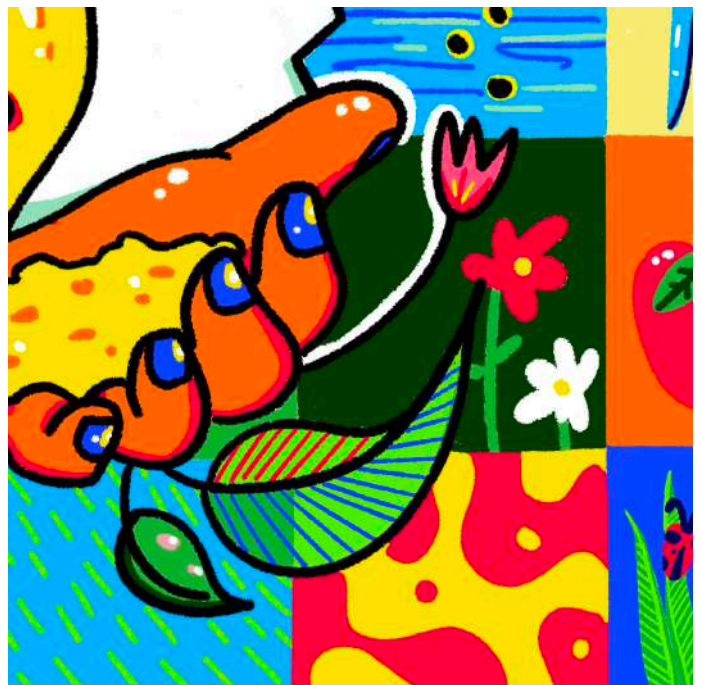
Plus de 200 termes ont initialement été présélectionnés. L'équipe a ensuite épuré la sélection en choisissant les termes les plus pertinents ainsi que ceux qui s'appliquaient à la philanthropie canadienne.

Est-ce que les définitions des termes sont valides partout?

Les définitions ont été développées en fonction du cadre institutionnel canadien. Puisque de nombreux termes sont utilisés dans différentes parties du monde, les définitions qui relèvent de la législation canadienne peuvent différer si appliquées à des cas internationaux. De plus, les définitions sont évolutives selon le temps, le contexte et le territoire.

Bonne recherche!

Vous pouvez consulter le Wiki [ici](#).





A Wiki of essential philanthropic terms

Why create a philanthropy glossary?

Following an exercise carried out as part of a study with partners external to the philanthropic community, the need for a philanthropic glossary that was Canadian, bilingual and available to all was undeniable. A definitional tool such as a philanthropic glossary on the PhiLab website seemed the most appropriate option.

Who wrote the definitions?

The definitions were compiled from various existing organizational and governmental glossaries. Permission to use the definitions in their entirety was obtained for some definitions, in which case quotation marks are used. Other definitions have been paraphrased by the project team. To respect the copyright of definitions used in full or paraphrased, the source appears after each definition.

Are the French and English definitions from the same source?

Yes, the definitions were first selected and, where appropriate, paraphrased in the language of the source. They were then translated to stay true to the original source.

How did you decide which terms to include?

Over 200 terms were initially pre-selected. The team then refined the selection by choosing the most relevant terms and those that applied to Canadian philanthropy.

Are the definitions of the terms valid everywhere?

The definitions have been developed with the Canadian context in mind. Since many terms are used in different parts of the world, the definitions used in Canadian legislation may differ when applied to international cases. Moreover, definitions evolve with time, context and territory.

Enjoy your research!

You can consult the Wiki [here](#).



L'Année PhiLanthropique

The PhiLanthropic Year



PhiLab

Réseau canadien de recherche
partenariale sur la philanthropie

Canadian Philanthropy Partnership
Research Network



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