

# 2019 ANNUAL REPORT

CONTINUING WITHIN THE SECOND STAGE

MARCH 2020



## PhiLab

CANADIAN PHILANTHROPY  
PARTNERSHIP  
RESEARCH NETWORK





## TIMELINE RECAP

### Phase 1 - SSHRC Project

#### Key accomplishments

- Operational implementation of the Eastern Hub (Montreal)
- International Conference - Economics and Environmental Crises
- Publication of 'Les fondations philanthropiques: De nouveaux acteurs politiques?'
- Publication of 17 research papers

#### Key accomplishments

- Operational implementation of the Regional Hubs
- Publication of 2 research papers, 25 blog articles, 6 interviews and 11 special editions
- Implementation of a communications strategy: social media platforms and revamping of the entire PhiLab website

2014-  
2017

2018

20  
19

### Phase 2 - SSHRC Project

01.

#### Infrastructure

Advancement of the administrative component of the Network and the Regional Centers (Hubs).



03.

#### The Academy

The role of students within PhiLab, their output and activities.

02.

#### Coproduction of knowledge

##### Observatory and Laboratory

The various 2019 PhiLab publications.

04.

#### Transfer of Knowledge

PhiLab's communications: newsletters, member communications, social media, etc.

2020-  
2024

### Next steps

Important upcoming events for the 2018-2024 Project.

## 1. INFRASTRUCTURE

# Administrative Implementation



## ACCOMPLISHMENTS

## Progress in Regional Center developpement

The co-directors of the overall project are: **Jean-Marc Fontan** and **Peter Elson**. The support staff that form the administrative team are: **Diane Alalouf-Hall** (up to December 2019) as coordinator, **Benoit Martel** as administrative agent and **Katherine Mac Donald** as the communications agent.

The main administrative components have been put in place: governance, policies, the administrative team, and technologies (website, email management, etc.)

## Regional and Sectoral Hubs

Each Hub is in a different stage regarding its infrastructure development. This includes the implementation of the team, governance, policies and technology (website, social media, etc.)



### 70%

- Two co-directors in place: **Lynn Gidluck** and **Iryna Khovrenkov**
- Hub-specific website in place: [www.fundersinthewest.ca](http://www.fundersinthewest.ca)
- Established research project
- Recruitment new research members



### 70%

- **Manuel Litalien** and **François Brouard** are the Hub co-directors and **Andrea Kosovac Sykes** is the new coordinator, replacing **Kristen Pue** as of late 2019.
- Participation in the blog
- Established research project



### 85%

- Operational team in place with **Caroline Bergeron** as new Director, replacing **Sylvain A. Lefèvre** as of Summer 2019 and **Diane Alalouf-Hall** as Coordinator
- Established research projects
- Participation in the blog
- Established Academy program



### 70%

- **Roza Tchoukaleyska** is the director and **Brady Reid** is the coordinator
- Research projects in development
- Participation in the blog
- Recruitment of new partners



### 15%

Photo credit: Sara Race Photography

- **The Circle on Philanthropy and Aboriginal Peoples in Canada** is leading this sectoral Hub
- The Hub is still in development

## 2. COPRODUCTION OF KNOWLEDGE

# Laboratory – Long term research



## International, National and Regional progress

Research projects can be on the international, national or regional scale, including some projects that straddle more than one. Below you will find a list of projects currently underway, each at different stages of development.



### 7 projects

Edited book by **Peter Elson**  
Philanthropic Foundations in  
Canada: Landscapes, Indigenous  
Peoples and Pathways to Change to  
be published in Spring of 2020

- Impact Investing / Responsible Finance
- Case studies on private foundations contributing to sustainable development goals (SDGs) in Canada in innovative ways
- ... and more



- Europe: France: Philanthropy social science program
- Latin American Unit: 1 project
- African Unit: 1 project in evaluation
- United States Unit: 1 project

## Regional Research Projects



### 1 project

- United Way and 211: Role in Emergency Management



### 6 projects

- Social Inequalities
- Professional practices in philanthropy
- Citizen action in the building of alternative food sourcing: the case of Montreal
- ... and more



### 2 projects

- Impact of operational funding
- Philanthropic support for Canadian journalism: A road map



### 1 project

- The role of philanthropic activity in supporting social sustainability in rural Newfoundland

2. COPRODUCTION OF KNOWLEDGE

# Observatory - Short-term research

PhiLab's publications include research papers, blog articles, interviews with the sector's actors, a watch of philanthropic resources (PhiLibrary) and theme-oriented monthly issues.



LANGUAGE PARITY ACHIEVED

## Language of publication and distribution of knowledge

Many more articles were written in English this year, thanks to the mobilization efforts made by the Regional Hubs and the fact that each Hub is now responsible for their own portion of the monthly special editions, mobilizing their own networks and generating content from new authors.



Percentages represent changes since 2018

## 3. ACADEMY DIVISION

# The work of our students

## ACADEMY ACTIVITIES

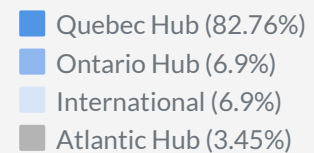
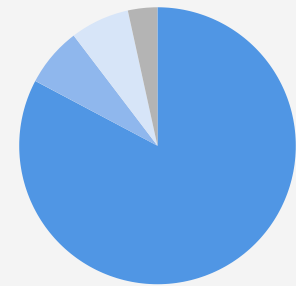


## More than coursework

PhiLab's students are an essential resource for our Network. They produce blog articles, reading workshops and book reviews as well as interviews with our partners. There are also seminars and a study day organized throughout the year.

## 29 students

▲ 290%



## Consolidation of Academy Division

Given the current level of development of the Academy division of each hub, PhiLab's Academy resources are concentrated at the National level instead of being separated per Hub.

### 2019 Accomplishments

- 25 total blog articles 9 interviews
- Over 200 publications on the student Facebook group, that has 37 members
- A dozen events aimed at students: Reading seminars, My Project in 20 minutes, etc.
- Holding of the first Student Day in the Quebec Hub on November 28th 2019
- Partnership with UdeM's Certificate in non-profit management

### Student awards



This year, PhiLab launched the first student awards.

The winners were:

- **Rosane dal Magro** for participation
- **Renaud Judic** for best publication

Congratulations!

### MITACS funding

PhiLab's student representative **David Grant-Poitras** finalized his research project: "*Les fondations philanthropiques investissent l'écosystème de la finance socialement responsable. Études de la Fondation Béati et de la Fondation de la famille J.W. McConnell.*"

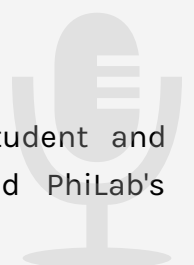
#### New request for the upcoming year

**Adam Saifer** has applied for a second grant with PhiLab Canada, in partnership with PFC Podcast and the Fondation Lucie et André Chagnon.

### Podcast

**Kristen Pue**, Ontario Hub student and exiting coordinator, published PhiLab's first student podcast:

**Interview with Nisha Patel**



4. DISTRIBUTION OF KNOWLEDGE

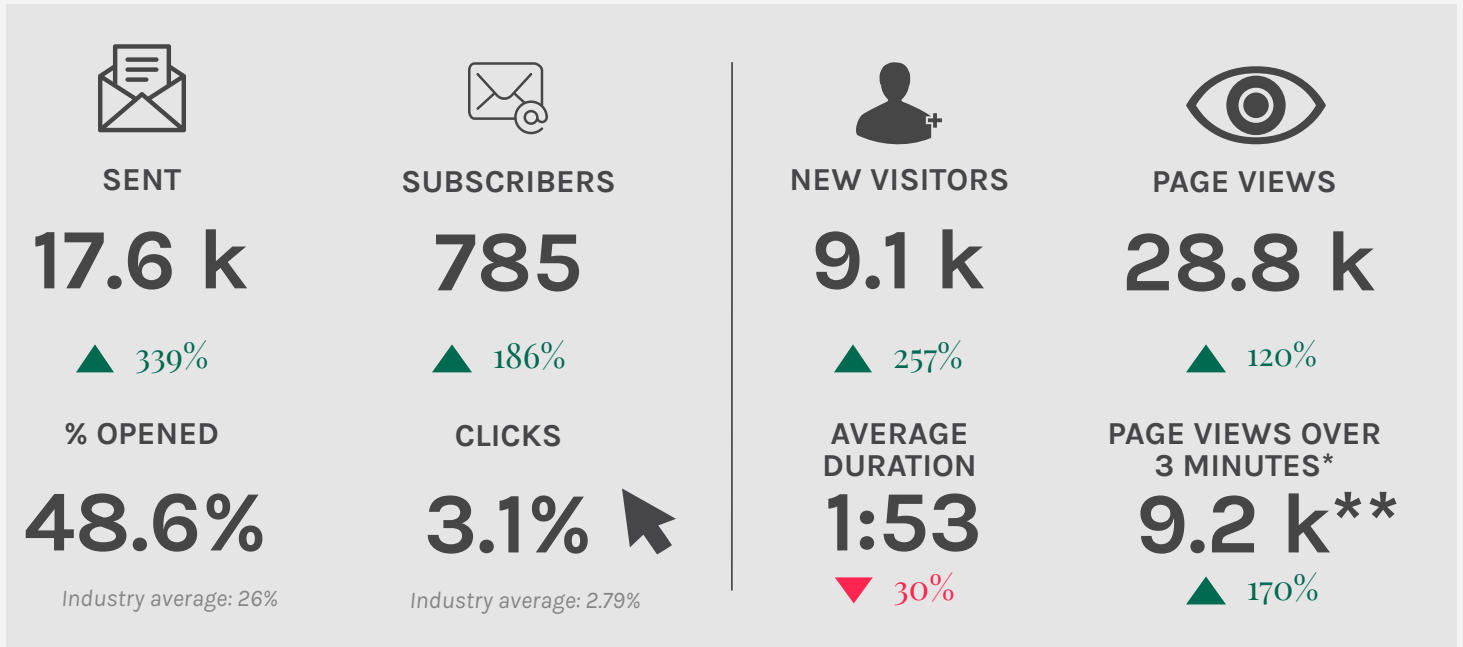
# COMMUNICATIONS

EMAIL, SOCIAL MEDIA AND WEBSITE

There has been a marked effort on communications over the past year

## Email

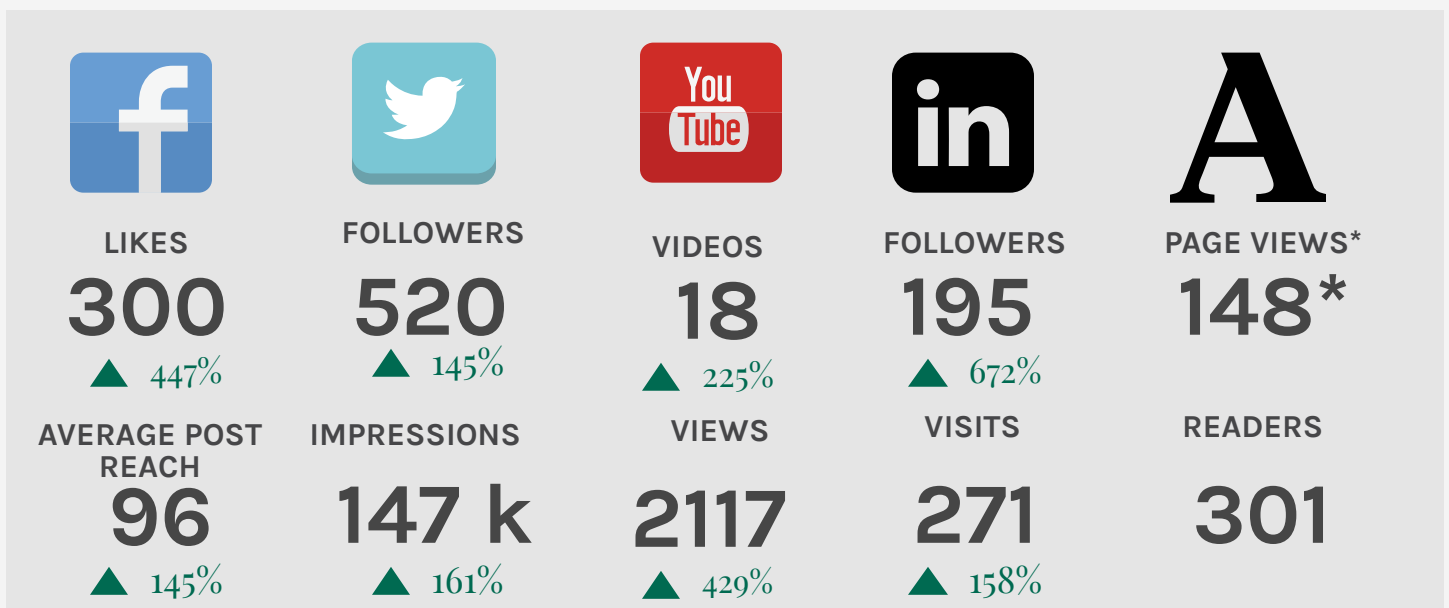
## Website



\* The time frame considered was between 3 and 30 minutes, considered to be the time to read an article

\*\* This represents 32% of total page views

## Social Media



\* Data only available for the past 60 days

4. DISTRIBUTION OF KNOWLEDGE

# Partner Relations

Our partners are present in all aspects of the research being done at PhiLab. From our blog articles, interviews, videos to research projects, we work in partnership with various actors of the sector. Below are several examples of our partner collaborations this year.

## Collaborative Publishing



Establishment of a partnership with **Alliance magazine** for the publishing of our blog articles

## Publications



Interview with former chair of **Rural Communities Foundation of Nova Scotia** Arthur Bull



Interview with Valerie Lemieux from the **Catherine Donnelly Foundation**



Publication of the article **L'importance de la transformation numérique pour le secteur social** by Lili-Anna Pereša, President and General Director of **Centraide du Grand Montréal**

## Videos



## Research Projects





4. DISTRIBUTION OF KNOWLEDGE

# Events

## Philanthropy for Systemic Change

Networking & discussion with local & international foundations

**Co-Facilitators:**  
 **Adrienne Shuffler**, Co-Executive Director, EDGE Funders Alliance  
 **Lucie Gosselin**, Principal, Lumière Consulting and Partnership Development, Philab  
 **Edward Metens**, Just Transition Research Collaborative, University of London Institute in Paris

**Special Guest:**  


November 5th, 2019  
 5:30pm-7:30pm  
 Université de Montréal - FEP  
 3744, Jean-Brillant - Room 104  
 Côte-des-Neiges metro

A networking cocktail is planned for after the presentations. This event will be held mainly in English.





9 AVR  
 8h30-17h00  
 MTL

## ÉVALUATION ET MESURE D'IMPACT EN ÉCONOMIE SOCIALE

Des processus à l'impact : Pour une évaluation à la mesure de l'économie sociale



Partenaires organisateurs de l'événement



# 2019

UQAM | Département de sociologie

## 1ère Journée d'étude du PhiLab Québec

Des initiatives s'appuyant sur le numérique, en particulier sur le Big data, l'intelligence artificielle voire les objets connectés, peuvent-elle contribuer à plus de solidarité ?

Intervenants:  
 Valerie Peugeot  
 Tanya Perelmutter  
 Jacques-François Marchandise

Retransmission en direct à l'UQAM  
 Pavillon Paul-Gérin-Lajoie  
 Salle N-7050  
 mardi 22 Octobre 2019  
 12h00-14h00







Rencontres « Solidarité et numérique »

Faculté de l'éducation permanente Université de Montréal et du monde.



### Philanthropie : Expérience et perspectives d'avenir

Conférence inaugurale de l'année 19-20 du Certificat en gestion philanthropique et du Philab

Que avenir pour les relations entre les fondations privées et le secteur de la bienfaisance ?

Avec Madame Hillary Pearson, Présidente sortante de Fondations Philanthropiques Canada

12 septembre 2019  
 17h30 à 18h45  
 Université de Montréal  
 Pavillon 3744 Jean-Brillant - Salle 104

Les fonds recueillis sont destinés à financer les activités de recherche des étudiants du Philab.

ANSER-ARES 2019 CONFERENCE  
 UNIVERSITY OF BRITISH COLUMBIA  
 JUNE 5 - 7, 2019

SÉMINAIRES ACADEMIE DU PHILAB

## POINT METHO

Aspects méthodologiques pour les étudiants-es à la maîtrise et au doctorat

Table ronde Philab-FEP UdeM

## LA PHILANTHROPIE SAUVERA-T-ELLE LA PRESSE?

Avec  
   

Vendredi 5 avril 2019  
 12h30-14h00

FEP - UdeM  
 salle 104  
 Pavillon 3744  
 Jean-Brillant  
 Montréal  
 Métro Côte-des-Neiges

Une invitation pour les étudiants-es et les professionnels-es en journalisme et en gestion philanthropique. Inscriptions sur Eventbrite et plus d'informations sur [www.philab.quebec.ca](http://www.philab.quebec.ca)



UPCOMING EVENTS

# Important steps to come

Here are the important upcoming events in the 2018-2024 SSHRC Project

## 2020

**ANSER Annual Conference**  
London, ONtario, June 3rd - 5th



**PFC Biennial Conference**  
Quebec city, October 20th - 22nd

**88e Congrès de l'ACFAS**  
Sherbrooke May 4th - 8th

**ISTR 14th International Conference**  
Montreal, July 7th - 10th

**WINGS FORUM 2020**  
Nairobi, Novembe 3rd



**Regional Hub  
PhiLab Conferences**

## 2021

**National  
PhiLab Conference**



## 2022

**International  
PhiLab Conference**



## 2023

## 5. FINANCIAL REPORT

January to December 2019 Report

<b>Balance 2018</b>	<b>Revenues</b>	<b>Commitments</b>	<b>Real</b>	<b>Total expenditures</b>	<b>Balance 2019</b>
\$224 074	\$626 129	\$78 820	\$475 324	\$554 144	\$296 059
<b>Revenue 2019</b>					
					\$423 200
					\$162 200
					\$30 000
					\$10 000
					\$729
		<b>TOTAL</b>			<b>\$626 129</b>
<b>Expenditures 2019</b>					
		<b>Commitments</b>	<b>Real</b>	<b>Total expenditures</b>	
Mitacs (post-graduate students)		\$ -	\$31 101	\$31 101	
Student salaries		\$6 536	\$65 000	\$71 536	
Professional salaries		\$57 643	\$110 566	\$168 210	
Social Benefits		\$13 820	\$30 823	\$44 643	
External Professional Fees		\$ -	\$31 875	\$31 875	
Transport and accomodation costs		\$ -	\$30 649	\$30 649	
Hosting and Networking costs		\$ -	\$2 479	\$2 479	
Supplies		\$ -	\$3 720	\$3 720	
Printing costs		\$ -	\$1 879	\$1 879	
Computer Equipment		\$729	\$1 283	\$2 104	
Lecturer charges		\$ -	\$23 000	\$23 000	
Inter-university transfers		\$ -	\$142 948	\$142 948	
<b>TOTAL</b>		<b>\$78 820</b>	<b>\$475 324</b>	<b>\$554 144</b>	

## 5. FINANCIAL REPORT

## Beginning to December 2019 Report

<b>Expected income December 31, 2019</b>	<b>Revenues</b>
SSHRC Funding	\$784 400
Partner funding	\$254 167
<b>TOTAL</b>	<b>\$1 038 567</b>

<b>Real Income December 31, 2019</b>	
SSHRC Grant	\$784 400
Partner Funding	\$270 700
Mitacs (post-graduate students)	\$30 000
Juniper Glass Project	\$10 000
Revenues from Publisoft	\$729
<b>TOTAL</b>	<b>\$1 095 829</b>

<b>Ratio predicted vs. real income</b>	<b>Revenues</b>
Total income predicted for 6 years	\$3 392 500
Real income December 31, 2019	\$1 095 829
%	32 %

<b>Income vs. expenditures beginning - December 2019</b>	<b>Revenues</b>
Real income until December 31st, 2019	\$1 095 829
Real expenditures up to December, 2019	\$682 882
Commitments up until December 31, 2019	\$116 888
Balance December 31, 2019	\$296 059

# Annual Report

2018 - 2024 SSHRC Project



**PhiLab**

CANADIAN PHILANTHROPY  
PARTNERSHIP  
RESEARCH NETWORK

Université du Québec à Montréal  
Pavillon Saint-Denis (AB), 10th floor.  
1290, rue Saint-Denis  
Montréal (Québec) H2X 3J7

Telephone: 514-987-3000 #8576

Email: [philab@uqam.ca](mailto:philab@uqam.ca)

[www.philab.uqam.ca](http://www.philab.uqam.ca)



Social Sciences and Humanities  
Research Council of Canada

Conseil de recherches en  
sciences humaines du Canada

**Canada**