



PHILANTHROPIC
FOUNDATIONS
IN CANADA

LANDSCAPES,
INDIGENOUS
PERSPECTIVES
AND PATHWAYS
TO CHANGE

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Dedicated to our dear
friend and colleague
Jack Quarter
1942–2019

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Centraide's Collective Impact Project: Poverty reduction in Montréal

Nancy Pole and Myriam Bérubé





Launched in late 2015, Montreal's Collective Impact Project (CIP) is a five-year collaborative philanthropic initiative that describes itself as an accelerator of community change. As of June 2018, the CIP was composed of ten philanthropic partners, including Centraide of Greater Montreal (Centraide) as project manager and nine grantmaking foundations acting as financial partners. Three non-financial partners are also involved in the CIP's governance.

Through the pooling of financial and non-financial resources, the CIP aims to intensify and ensure greater coherence to supports given to comprehensive community change processes in Montreal. The project is based on the assumption that, if both funding support and funders' strategic actions are coordinated, local communities will be able to achieve more meaningful results with regard to poverty reduction.

This chapter discusses the CIP as a case study highlighting possibilities and challenges relating to funder collaboration as a means of shifting the dynamics associated with complex funding ecologies. This case study also shines a light on the evolving expression of community leadership by place-based foundations.

The CIP follows in the established tradition of place-based philanthropy, and wrestles with challenges related to the funder's role in collective impact. As an initiative, it represents continuity as well as a new development in Montreal's funding ecology. By introducing a new opportunity for funders, grantees and policymakers to come together and test out new ways of working, this initiative shines a light on existing relationships and system dynamics, while casting ripples that may (or may not) have a lasting effect elsewhere in the system. In addition, the CIP signals philanthropy's intention and capacity to occupy a more significant place within Montreal's funding ecology.

The partners of the Collective Impact Project as of June 2018

- Centraide of Greater Montreal (project manager)
- Lucie and André Chagnon Foundation
- Pathy Family Foundation
- McConnell Foundation
- Mirella and Lino Saputo Foundation
- Silver Dollar Foundation
- Foundation of Greater Montréal
- Molson Foundation
- Marcelle and Jean Coutu Foundation
- Trottier Family Foundation

This chapter draws upon the findings of a commissioned action research project that was carried out by Nancy Pole and Jean-Marc Fontan of PhiLab in 2016–17.¹ Its findings were drawn from 25 semi-directed interviews with partners, local representatives and other key informants, as well as a review of project documents and a literature review that provided a reading of relevant elements of the context.

The study described the vision of the CIP's original co-architects, Centraide and the Lucie and André Chagnon Foundation, and reviewed key moments of the design and early implementation phases. It focused in particular on how the partnership formed and how it changed over the first year of the initiative, on how the initiative was rolled out, and on the kind of reception it was given by grantees and other constituents. The original study produced findings and recommendations that were actionable in the short term, supporting greater awareness among partners and suggesting possible future adjustments. In the spring of 2018, an in-depth interview with the CIP's program director, Myriam Bérubé, provided a further update on evolving conditions and emerging challenges, as well as recent adaptations and adjustments to the project's management and governance.

Written at roughly the half-way point in the CIP's five-year trajectory, this chapter captures a point in time in a highly developmental initiative. Designed as an adaptive initiative, from one year to the next the CIP remains open to an ongoing and continuous process of discovery and adjustment. Thus, the chapter describes only the first half of the CIP's trajectory, not the outcomes or the final lessons. As a reflection on a still-unfolding initiative, its aim is to describe the project's specificities and engage with elements of the experience that may have some resonance for the broader field, including place-based foundations, private and public funders that are looking for ways to engage differently in complex funding ecologies, and practitioners and researchers involved with the still-unfolding field of collective impact.

¹ The report, Montreal's Collective Impact Project (CIP) and the first stages of its partnership and operationalization, can be downloaded at: <https://philab.uqam.ca/wp-content/uploads/2018/01/rapportPIC.pdf>

Context

Reference points: comprehensive community change and collective impact

The CIP is inspired by the traditions of place-based philanthropy and of foundation support for comprehensive community initiatives (CCIs), also referred to as comprehensive community change efforts. In adopting a place-based approach, funders are often motivated by a recognition that their grantees do not operate in isolation but are part of an interdependent geographic “system” or “ecology”, whose resilience and adaptability depend on collaboration rather than competition (Institute for Voluntary Action Research – IVAR, 2015, p. 1).

Foundation-supported comprehensive community change, for its part, rose to prominence in the United States in the 1990s and 2000s, while in Canada the flagship initiative in this area was Vibrant Communities, supported by the McConnell Foundation from 2002 through 2012 (Gamble, 2010; Cabaj, 2011). Defining characteristics are:

- a comprehensive and integrated orientation to community change involving work across multiple areas such as housing and the built environment, social services, and economic and social development
- a community-building orientation focusing variably on communities’ participation or control over their own agenda for development
- an intention to catalyze some kind of systems change leading to more effective supports for devitalized communities (Aspen Institute, 2012)

Following its emergence in 2011, the collective impact framework has come to provide community change practitioners with a common language and frame of reference to succinctly describe the underlying principles of comprehensive community change and other collaborative initiatives (Weaver, 2014; Christens & Inzeo, 2015). The framework is built on the premise that solving complex problems requires the intensive engagement of influential partners across a variety of sectors, who then collaborate to leverage the resources at their disposal to drive toward outcomes in line with the desired changes (Weaver, 2016). More recent writings on collective impact have helped to bring the framework more in line with the principles and practices of community development, infusing it with the lessons learned from the older community-change tradition (Brady & Juster, 2016; Cabaj & Weaver, 2016; Kania & Kramer, 2016; Wolff, 2016).

The CIP’s very name – Collective Impact Project – indicates that the project’s designers and partners find this framework a useful reference point in their own thinking about how community change occurs. They are not alone; the collective impact concept has attracted particular attention from funders of collaborative initiatives, who appreciate the shift in emphasis

away from the organizing *process* towards the *outcomes* to be achieved (Christens & Inzeo, 2015). Inspired by these and other trends, these funders have for some time been communicating expectations that collaborative initiatives be able to measure and demonstrate their own impact (Walzer *et al.*, 2016).

Regional context

The CIP was made possible by a particular context and set of enabling conditions in Montreal. Nonprofit and public sector organizations already had an established tradition of place-based collaboration, supported by various funders, public programs and structures in Montreal and elsewhere in Quebec (Klein & Champagne, 2011; Longtin & Rochman, 2015; Opération veille et soutien stratégique, 2017).

Of particular relevance to the CIP, between the late 1980s and the early 2000s, 30 local cross-sector and multi-stakeholder neighbourhood roundtables had emerged across the city of Montreal. Over the years a good number of these neighbourhood roundtables had come to occupy “backbone” roles, supporting the development of a shared vision of community change for their neighbourhoods, and then leading a joined-up action plan that served as a guidepost to help local organizations align their own actions with collectively determined priorities. Centraide already had well-established relationships with these roundtables, providing core and project funding for over a decade prior to the advent of the CIP. Alongside this, many roundtables also managed project funding from various other sources that was specifically earmarked for cross-sector, collaborative local initiatives focused on poverty reduction, neighbourhood revitalization, or the development of healthy environments for children, youth and families.

In the year leading up to the CIP’s launch, a number of shifts began to be felt within the funding landscape for community change, including the end of a series of funding partnerships (described below) that had supported the funding and roll-out of hundreds of cross-sector community change initiatives across Quebec. On top of this, a series of austerity-motivated administrative reforms and government funding cuts had an immediate impact on the infrastructures that supported local and regional social development processes in Quebec (these are further discussed in Chapter 9 by Annabelle Berthiaume and Sylvain A. Lefèvre). This scale-back of institutional supports for community-change processes left many communities uncertain about how to hold on to the gains that they had worked so hard to achieve. In the context of such sector-wide upheaval, the scene was somewhat fortuitously set for a major new philanthropic funding initiative to emerge.

The idea for the CIP takes shape

The idea for the CIP emerged out of a dialogue between Centraide of Greater Montreal and the Lucie and André Chagnon Foundation. The two organizations had been in contact with each other for a number of years, as each had its own history of supporting broad-spectrum community development approaches.

From the late 1990s onwards, Centraide had progressively developed a comprehensive approach to supporting community development, providing funding and other supports to neighbourhood roundtables to help them develop their capacity to lead comprehensive community-change processes. Between 2007 and 2009, the Chagnon Foundation had set up three province-wide funds (Québec en Forme, Avenir d'enfants and Réunir Réussir) in partnership with the government of Quebec. The parameters of these funds had called for cross-sector organizing and collaborative engagement in local communities across the province (Brunet, 2014).

Starting in 2012, the two foundations together began to explore opportunities to develop a more purposeful strategic partnership focused around comprehensive community-change approaches in Greater Montreal. The context was conducive for each organization. As the sunset period approached for the three funds set up by the Chagnon Foundation, the foundation was engaging in a strategic reflection about the next direction for its community-change investment strategies. Centraide, for its part, was aware of the limits of its own capacity to scale up its support for comprehensive community-change work, whether this be on its own or as a partner within the *Initiative montréalaise (IM)*,² and was wanting to explore new ways to reach beyond these limits.

Centraide was also contending with major ongoing changes in the fundraising environment, as its federated model came to be challenged by the proliferation of new fundraising channels and platforms (Pereša & Viens, 2015; Centraide, 2016a). To help counter the impact these trends were having on its campaign, Centraide undertook two strategic shifts:

- It publicly repositioned itself as a value-added philanthropic actor, acting to raise its own profile as an expert, convener and leader in regional social development. In making this move, Centraide followed in the footsteps of other North American community philanthropy organizations that have sought to position or brand themselves in ways that give them a comparative advantage with donors, in particular by taking up a “community leadership” role in the social development of their city or region (Graddy & Morgan, 2006; Paarlberg & Meinhold, 2012).

² A funding and strategic partnership of Centraide of Greater Montreal, the Montreal Regional Public Health Department (Direction régionale de la santé publique de Montréal – DRSPM), the City of Montréal and the Montréal Neighbourhood Round Tables Coalition (CMTQ).

- It devised a new campaign strategy that involved soliciting “transformational gifts” from major donors – large donations spread out over several years – and engaging these donors in establishing and rolling out specific granting initiatives (Centraide, 2015). The CIP offered itself up as a first opportunity to test out this new transformational gift strategy.

As the CIP began to take shape, a first key decision was that Centraide would act as the project’s lead and manager. In setting itself up to play this role, Centraide put forward a value proposition that hinged on its deep knowledge of the CIP’s content area, its existing relationships with community and institutional stakeholders, and its established capacity to manage the project. With respect to this last element, since 2010 the role of Centraide’s program officers has shifted towards a more proactive one based on close, embedded relationships with neighbourhood stakeholders across Montreal (Centraide, 2016b).

The CIP’s specificities

A shift towards trust-based funding mechanisms

The CIP was designed to address a specific issue: available funding for neighbourhood revitalization processes was limited in scope, standardized in nature and highly fragmented, as each funding source had its own set of guidelines and parameters. Neighbourhoods relying on these existing funding sources were challenged to coordinate and fit the different pieces of funding together in ways that would support the integrity of their neighbourhood’s development plan. In the two years leading up to the CIP, some representatives of local roundtables had challenged Centraide to use its influence to find a solution to this problem.

As a direct response to this issue, the CIP set out to make more substantial amounts of funding available to neighbourhoods to support them in implementing their comprehensive action plans. In contrast to most funding programs’ normative constraints, CIP funding would be flexible and adaptable to the different needs expressed by stakeholders on the ground.

The thinking that informed the CIP’s design was aligned with research findings about the conditions and requirements for successful design, coordination and support of comprehensive community-change efforts (Karlström *et al.*, 2007; Kubisch *et al.*, 2010; Burns & Brown, 2012; Auspos & Cabaj, 2014; Hopkins, 2015). A core principle of the CIP’s design was that communities should be able to articulate what kinds of outside supports they need, based on the priorities for change that local stakeholders and residents have established together. Communities receiving CIP funding could set their own goals and targets for change, including improvements to

community engagement processes and dynamics, improvements to living conditions and quality of life in the neighbourhood, or systemic issues that affect the welfare of local populations.³

In taking this route, the CIP's originators chose a complexity-friendly funding model built on devolution of decision-making and trust in local communities' intrinsic motivation to determine and drive the changes that will most benefit them. This stands in marked contrast to other strong trends in the funding landscape (inspired by the New Public Management paradigm) that incur transaction costs for applicants and funders alike, such as competitive grant-awarding processes, payment-for-results schemes, and public–nonprofit sector contracting and procurement (Knight *et al.*, 2017).

Based on their previous experience with funding community change efforts in Montreal, the CIP's co-architects believed that some neighbourhoods had reached a certain level of maturity in their stakeholders' ability to work together and achieve results. They considered that the conditions were there for these neighbourhoods to achieve appreciable progress in poverty reduction and in improving their residents' living conditions and quality of life.

Following up on this, five neighbourhoods were selected to receive substantial resources for implementation of their entire neighbourhood plan; these five neighbourhoods were intended to be the primary testing ground of the CIP's central intention. Twelve other neighbourhoods received more moderate amounts of funding for specific pieces of their neighbourhood development plan.

The CIP's design also featured a range of customized capacity-building supports for funded communities. This is in keeping with research findings that note that communities need to have strong and well-established collective capacity in order to be able to generate significant impacts (Gamble, 2010).

Lastly, the CIP was designated as a learning project. Because of the inherent complexity of comprehensive community-change processes, observers of the field call for a continuous learning approach that can support flexible and adaptive management strategies (Kubisch *et al.*, 2010; Auspos & Cabaj, 2014). The CIP's evaluation, knowledge mobilization and knowledge transfer activities were designed to occur within and across funded neighbourhoods, as well as between neighbourhoods and funding partners. Lessons would be shared with other communities engaged in comparable initiatives elsewhere in Quebec, Canada and the United States.

³ The CIP's website (<http://pic.centraide.org/en/#>) provides a brief description of community change initiatives in all 17 neighbourhoods.

Expansion of the partnership to form a funder collaborative

The comprehensive community-change research literature also points to the need for foundations to recognize the broader funding ecosystem in which they are operating. Rather than go it alone, they should reach out to prospective partners from the start and build in opportunities for still more partners to align with the initiative over time, sometimes in ways that require some adaptation of the overall scope and direction of the place-based effort (Burns & Brown, 2012).

As Centraide and the Chagnon Foundation worked to develop the project, a second key decision made was to expand the partnership beyond the two originators. The CIP's co-architects believed that a broader funder collaborative could better impact systems-level outcomes by modelling new types of funding practices, and by influencing regional policy alignment in support of poverty reduction and community change.

During the ten months leading up to and immediately following the CIP's launch, the senior leadership of both Centraide and the Chagnon Foundation leveraged their existing relationships to bring in five other philanthropic foundations with roots in Montreal.⁴ After the CIP's launch, three more foundations⁵ joined the CIP during the first years of its rollout, bringing the total number of foundations involved in the partnership to ten, Centraide included.

Two reasons guided the choice to look to philanthropic foundations to form a funder collaborative rather than to public sector funders, even though many of those engaged had little background with funding comprehensive community change. First, rather than attempt to create cross-sector alignment right from the start, the idea was to engage a group of more agile, independently resourced funders to build the template for funder alignment from the ground up. Second, as eligible major donors to Centraide, philanthropic foundations could be engaged in the CIP as the test case for the organization's new transformational gift strategy.

Two major public sector institutions – the City of Montreal and the Montreal Public Health Department (*Direction régionale de la santé publique de Montréal – DRSPM*) – were also approached to join the project as non-funding partners.⁶ Their association was strategic, as they provide core funding (with Centraide) to the neighbourhood tables through the *Initiative montréalaise* and manage a number of other funds that support local collaborative initiatives. It was hoped that their participation in the CIP steering committee would lead them to use their leverage within their own institutions in order to foster greater alignment between CIP-funded programming and these other funding programs, as well as other policy leverage points. If these players could help to

⁴ The Pathy Family Foundation, the McConnell Foundation, the Mirella and Lino Saputo Foundation, the Silver Dollar Foundation and the Foundation of Greater Montréal.

⁵ The Molson Foundation, the Marcelle and Jean Coutu Foundation and the Trottier Family Foundation.

⁶ A third non-funding partner, the Coalition of Montreal Neighbourhood Roundtables, is discussed later in this chapter.

shift the dynamic of collaboration and alignment at the regional level, this would positively affect local communities' capacity for action.

In joining the CIP partnership, each partner foundation agreed to make a five-year financial commitment; beyond the entry-level contribution that was established, these ranged in size according to each partner's capacity. The end result: a total pooled amount of \$23 million was made available over five years for communities selected for CIP support.⁷ Funds would be disbursed annually according to individual partner agreements, and a steering committee was formed bringing all partners together. Centraide would act both as project manager and as funder intermediary, receiving partners' contributions and allocating funds to communities.

Negotiating funder collaboration: adapting the model to support engagement and buy-in

The CIP's original operating model represented a form of funder collaboration that placed relatively few demands on the organizations involved. Especially in the first year, the partners' role in decision-making was limited. Rather, they signed on to a project in which they would be "learners" and in which Centraide would take on both risk and responsibility as project manager, fulfilling coordination and community relations roles, providing analysis and expertise, and mediating between partners and neighbourhood roundtables.

Various aspects of the project originators' proposal appealed to the funding and institutional partners who signed on to the CIP, including the opportunity for grantmaking foundations to work together, to be better able to measure the impact of their grants, to learn about ways to support comprehensive community change efforts that were most likely to produce lasting results, and to have an effect on the broader ecosystem.

However, as most of the funding partners did not participate in the project's design, it turned out that their buy-in and engagement were somewhat transactional. Beyond the intentions laid out in the co-architects' proposal, most of the funding partners had their own interests and intentions. Each was coming at the CIP from their own particular frame of reference, whether that be social innovation, social entrepreneurship, or philanthropy's role in shaping placemaking practices and new urban development. Some funding partners were less interested than Centraide and the

⁷ These are confirmed financial commitments at the time of writing.

Chagnon Foundation in building upon existing features of an established community change ecosystem, seeking rather to open it up to new influences and different ways of thinking about and embracing change, or looking to disrupt established ways of operating and providing funding.

Before the end of the CIP's second year, it became clear that the project would need to find ways to reconcile and respond to partners' different expectations. The initial operating model was well suited to certain purposes (granting efficiency and funder learning) but, as time went on, partners had begun to express intentions and expectations that fitted better with a more integrated and high-engagement operating model in which partners would need to collaborate to establish common objectives, coordinate strategies and leveraging capacities, and work together to exercise joint influence. At the same time, if the CIP were to evolve in this direction, it might cease to be "Centraide's project", as most saw it, and become a project where risk, responsibility and authority for decision-making would be more distributed.

At the project's half-way point, shifts were made to the project's governance and operations models to try to accommodate these different intentions and ambitions.

Decentralized governance

First among these, a new governance model was proposed that allowed for differential levels of engagement among partners. Beyond statutory steering committee meetings, partners could get involved in working groups, conference calls focused on funding decisions and opportunities, and in roll-up-the-sleeves, unstaged, deep-dive working sessions with funded neighbourhoods. Those partners with less capacity or interest could simply be kept in the loop.

While these adjustments were made to respond to partners' expressed needs and expectations to step into a more active role, further adjustments may be necessary as the project continues to evolve. An emerging concern is that the pendulum may have swung too far in the direction of decentralization, without leaving enough oversight mechanisms in place to allow everyone on the steering committee to keep the overall strategic vision for the project firmly in view.

Brokering partner–community relationships and contributions

Second, Centraide shifted away from its position of sole community interface, to allow funding partners to enter into more direct relationships with funded communities. The potential advantages were clear: a more direct relationship with neighbourhoods could increase partners' sense of buy-in and commitment and allow them to identify new opportunities for funding or other supports that are connected to actual needs on the ground.

On the other hand, these new direct relationships between partners and neighbourhoods would need to be forged in a way that respects communities and helps to preserve their trust and buy-in

to the CIP. Poorly brokered connections could risk disrupting local relationships that are both the bedrock of community collaborations and also the basis for trust and good communication between funders and communities.

In this context, the relational capital that Centraide had built up over the years with neighbourhood tables and other community stakeholders represented an undeniable asset, and it made sense for Centraide to help broker and mediate this linking-up process, setting the stage for direct conversations to take place between funding partners and community representatives while preventing miscues and misunderstandings.

Emergent opportunities for new partner contributions

In parallel to the core CIP-pooled funding envelope, funding partners can also channel complementary contributions to CIP neighbourhoods. This opens up the possibility for partners to grant or to leverage resources towards communities both as needs and opportunities arise, and in ways that align with their own strategic orientations beyond the CIP.

As this has happened, the CIP has also become a point of encounter between stakeholders associated with different generations of urban collective action, each responding in their own way to the complex dynamics of metropolitan development and renewal in the early 21st century: on the one hand, pragmatic comprehensive community-change traditions rooted in specific neighbourhoods, and on the other, newer movements focused on reclaiming and redesigning public spaces, led by emerging social entrepreneurs that are not tied to place or neighbourhood in the same way as older nonprofits (Hamel, 2016).

The points of encounter between the CIP originators' intentions and foundation partners' other involvements can be both generative and disruptive as they play out on the ground. In attempting to broker some of these meeting points and offer a more curated experience of joining up the established and the new in some CIP-funded neighbourhoods, the challenge for Centraide has been to strike a balance, "adding new ingredients to the recipe without completely changing the dish that we are cooking".⁸

In the best case scenario, the CIP's focus on place – and the granular, real-world challenges that it presents – offers an opportunity for funding partners to reach a negotiated understanding of the most valuable contribution that each one can make, based on their respective specializations as funders (Kippin & Reid, 2015). However, this challenges the partners to arrive at a common reading of the environment in which they are operating, one that they did not share at the project's outset. In this context, the curated, on-the-ground experiences become sites of *bricolage*⁹ that in themselves are likely to yield insights, whether they succeed or fail.

⁸ Interview with CIP program director, May 29, 2018.

⁹ In social innovation scholarship and practice, the term *bricolage* refers to the recombining of existing and new ideas and elements to form something novel.

The CIP, collective impact and funder-grantee relations

Across much of the landscape of North American collective impact practice, funders play a lead role in convening multi-stakeholder initiatives that include their own grantees, staying on as active participants in the governance bodies and working groups of the initiative, and sometimes even positioning themselves to play a backbone role. This is consistent with the “grasstops” orientation of many of the earlier writings on collective impact, which place an emphasis on bringing together decision-makers and influential people to channel change. Numerous place-based funders, including the United Ways in the United States¹⁰ (United Way Worldwide, 2013), have embraced this understanding of their role in collective impact.

More recent reframings of collective impact criticize the grasstops orientation of these earlier writings, pointing to a need to pay more attention to power relations and equity issues within collective impact partnerships (Williams & Marxer, 2014; McAfee *et al.*, 2015). Other voices echo these points, shining the light even more directly on the funder–funder power dynamic and noting that its distortions become even more acute when foundations act as both funder and member of an implementing coalition (Kubisch *et al.*, 2010; DP Evaluation, 2012). Collective impact funders themselves have begun to grapple with how to better bring an equity lens into their work (Collective Impact Forum and GEO, 2015).

Neither entirely funder-led (grasstops) nor entirely community-led, the CIP is at the confluence of these two dynamics. While its goals and supports are funder-defined, the CIP has, from the start, respected and deferred to local processes for priority-setting and implementation; community stakeholders convene and facilitate their own collective impact initiatives at the neighbourhood level. Thus issues around equity, engagement, voice and representation take on a nested dimension, applying both within communities as well as to the relationship between CIP partners and grantee communities.

In this hybrid configuration, the CIP partnership has been grappling with its own set of challenges in relation to constituent engagement, equity and power-sharing. The CIP partners’ main concern has been with ensuring that community stakeholders have a voice in the initiative’s governance and operations.

There are two levels, or dimensions, to the process of opening up to grantee communities and bringing in their voice. The first dimension involves instilling greater openness in the relationship

¹⁰ United Ways in Canada have not embraced collective impact in quite the same explicit way, adopting instead a language of “community impact”.

through transparency and feedback mechanisms. The second involves giving grantee communities a voice in decision-making about the project.

Trusting relationships are crucial to the success of both place-based philanthropy and complexity-friendly funding (Karlström *et al.*, 2007; Knight *et al.*, 2017). Observers have argued that the very legitimacy of place-based philanthropy's changemaking ambitions and capacity depends on its ability to be transparent about goals, strategies, underlying assumptions and expectations, as well as on a willingness to engage in an ongoing dialogue with other important stakeholders (Brown, 2012; Fehler-Cabral *et al.*, 2016). At the time of the CIP's inception, the project could draw upon an existing wellspring of trust and goodwill between Centraide and Montreal neighbourhoods. However, that trust should not be taken for granted and will need to be maintained throughout the entire project.

Like others in the field (Albright, 2016), CIP partners have come to understand that if they want to maintain the foundations of trust and buy-in from local communities, they need to consider setting up mechanisms for feedback and dialogue with local communities. Adopting and modelling openness practices takes on even more importance in a project, like the CIP, that is predicated on shared learning. In order for everyone to learn from failure as well as from success, "intel" from the ground needs to be shared freely. As risk in the project is unevenly distributed, the partners who are less exposed to risk have come to realize that it is up to them to demonstrate that they wish to create conditions where failure is not only allowed but also welcomed as an opportunity for learning.

The CIP partners are aware of the challenges here; because of the inherent power dynamic in the funding relationship, grantees will often self-censor in their communications with funders, holding back on useful feedback. In cases where it is not possible to create anonymous feedback mechanisms,¹¹ funders need to model transparency, for instance by publicly sharing the feedback that they receive, and they need to demonstrate that feedback will be used to make improvements (Ranghelli & Moore, 2015). As project lead, Centraide has already made observable efforts in this direction, making changes to the CIP's parameters and capacity-building supports in response to grantee feedback.

Beyond feedback: voice, representation and power-sharing

Issues of genuine constituent representation likewise pose challenges in collective impact initiatives in which funders play a dominant role. The voice of communities is nominally represented in the CIP's governance, as the coordinator of the CMTQ (Coalition of Montreal Neighbourhood Roundtables) sits on the steering committee as one of the project's strategic

¹¹ For example, the grantee perception reports that the Center for Effective Philanthropy issues for the benefit of client foundations, or the platform created by the Philampify initiative of the National Committee for Responsive Philanthropy.

partners. Even if the CMTQ were to feel authorized and empowered by its own membership to represent community voice on the steering committee, the presence of one community voice alongside thirteen other partners, most of them funders, reproduces a significant imbalance in perspective between funders and communities.

As the partners search to ensure less tokenistic and more substantive engagement of community voices in the project, they may once again turn to lessons imparted by other funders, and consider different mechanisms for different purposes (Collective Impact Forum, 2018, p. 19).

One opportunity presents itself in connection with the CIP's systems-change ambitions, discussed in the next section. The CIP aims not only to help communities to make greater progress in their poverty reduction efforts, but also to tackle systemic barriers that can impede neighbourhoods' ability to move towards the change targets that they have established. Concretely, this would imply designing a strategy in consultation or in coordination with community stakeholders, based on the barriers and obstacles that they have identified. At the very least, these kinds of strategies would require setting up a dialogue mechanism allowing neighbourhood stakeholders to identify and share the systemic obstacles or barriers that they are encountering, and that might fall within the partners' sphere of influence. If this were to happen, the CMTQ could take on a more explicit role as an interface and spokesperson for the neighbourhood tables, helping to relay the issues that affect them locally but that are beyond their control to change. Here, to echo the recommendations of Dewar (2010) and Auspos and Cabaj (2014), it would be important to allow neighbourhood actors to define the influence strategies in which they can take leadership, wherever possible and relevant.

Changing systems

The CIP's aims for systems change are in line with recent writings which argue that, in order to really tackle complex problems, collective impact initiatives need to expand their scope beyond programmatic outcomes, such as improving service coordination in a given area, to focus their efforts on policy and systems change.

Similarly, the current generation of place-based philanthropy in support of comprehensive community change recognizes that broader policies and market trends shape and constrain what local initiatives can undertake and hope to accomplish; these include public and philanthropic funding programs and investment policies, policies and regulations related to housing, urban planning and commercial development, and procurement and local hiring practices in the public and private sectors (Dewar, 2010; Hopkins, 2015). In seeking "systems change", current-generation initiatives aim to bring about sustainable changes to policies and practices within the broader

ecosystem, in order to create an enabling environment for transformations to take place at the local level (Auspos & Cabaj, 2014; Mack *et al.*, 2014).

However, past experiences reveal that local communities tend to be unable to catalyze systems change on their own. Other actors with access to decision-making, including funders, are in a better position than local communities themselves to work to change practices and policies that hamper local revitalization efforts (Aspen Institute, 2012; Auspos & Cabaj, 2014). In recent years, this understanding has led foundations involved in supporting community change to carry out parallel strategies focusing on policy and systems change (Hopkins, 2015).

Systems change strategies may target practices in both the private and public sectors. Some comprehensive community-change initiatives have specifically sought to engage private-sector players to support local revitalization efforts in new ways, opening up new financing channels for impact investing or seeking to nudge urban development trajectories in a more inclusive and equitable direction (Mt. Auburn Associates, 2012; Ferris & Hopkins, 2015).

In keeping with these trends within the field, the CIP's funding and strategic partners have recognized that they have a role to play in leveraging opportunities and addressing systemic constraints that fall beyond local communities' range of influence. At the project's half-way point, opportunities have arisen to leverage new resources for broad strategies that span many neighbourhoods, and whose regional applications may extend beyond the CIP. These opportunities include:

- the alignment of funding strategies to fill gaps and better support the breadth and spectrum of local food-systems work taking place across almost half of CIP-funded neighbourhoods
- pulling in new resources and bringing new partners to the table to help CIP neighbourhood coalitions to become leaders in the redevelopment of abandoned industrial sites, quarries, even disused racetracks
- exploring opportunities to establish a public-private-philanthropic investment fund for building and renovating community infrastructure spaces, such as hubs for community agencies and social enterprises in the neighbourhoods they serve across the city – this last opportunity aligns with an emerging trend towards collaborative place-based impact investing (Ashley & Ovalle, 2018)

The CIP may also be able to act as a catalyst for alignment within and between public institutions. In Montreal's decentralized city government system, this is not a simple thing to achieve. As CIP neighbourhoods work to implement their locally prioritized development projects, many have run up against regulatory barriers at the municipal level. It was hoped that having the city's senior social development official on the CIP steering committee would make it easier to lift some of these barriers. The official in question has in fact taken a first step in this direction, calling a

meeting of social development program directors across all the city's geographic jurisdictions in order to begin a discussion about better program alignment in CIP neighbourhoods.

In the future, actions to create an enabling environment for CIP neighbourhood development plans will likely call on other forms of cross-departmental alignment within the city administration that go well beyond the social development branch, including housing, economic development, urban planning and land use, and transportation and public works.

Beyond the CIP, other developments within the regional funding and policy ecosystem may also be working to nudge players towards greater alignment. As an example, the City of Montreal's Policy on Social Development, launched in 2017 as the result of a lengthy engagement process involving over a thousand stakeholders and citizens, targets alignment both among city departments and across institutional boundaries, recognizing foundations among its major social development partners (Ville de Montréal, 2017).

As this illustrates, CIP partners will not be alone in working towards these kinds of outcomes, and indeed, the boundaries between the CIP and other processes of influence are likely to blur. Many CIP partners are also participants in various other multi-stakeholder regional governance initiatives in areas such as housing and built infrastructure, homelessness, education and food systems, all of which may at various points have cause to advocate for better cross-sector institutional alignment. A dense webbing of networks overlays the boundaries between these different regional governance spaces, allowing intentions to form and opportunities to be identified in ways that loop back and forth between the CIP and these spaces. As governments have increasingly come to cultivate private and third-sector contributions towards developing innovative solutions to complex social problems, these configurations are typical of the new networked governance that has come to shape policy and programs within cities and regions (Tibbitt, 2011; Tomalty, 2013; Cattacin & Zimmer, 2016).

The CIP's significance to Montreal's funding ecology and beyond

The CIP's arrival in the Montreal landscape can be read in a number of ways. With the inauguration of a trust-based model that provides flexible support for community-set priorities, the CIP represents a significant innovation in the community change funding ecology. Recognizing this, many community stakeholders have heralded its arrival, stating that the CIP has helped to fill a very real funding gap.

The CIP has offered Centraide the means to act on ambitions that it had long nurtured for its work in place-based philanthropy. It has also signalled a significant “win” for Centraide as it has sought to position itself in a community leadership capacity, as an influential broker with the ability to set agendas. This accomplishment, for all its rootedness in a specific context and history, may point to a way forward for other United Ways that are looking to focus their identity and renew their campaign strategies. At the same time, in choosing the route of convening and facilitating a funder collaborative, there is a tension to navigate between upholding a community leadership positioning and engaging in the type of adaptive, humble systems leadership required to engage a group of foundations as peers in a collaborative venture.

The CIP also signals a shift in Montreal’s funding landscape, in which philanthropy takes on an even greater role in setting the parameters and sculpting the contours of comprehensive community change work in Montreal. A shift of this nature has particular reverberations in Quebec where, in comparison with the rest of Canada, the state has continued to play a stronger role both in setting and delivering on social policy and in recognizing and supporting civil society and third-sector organizations (Hamel & Jouve, 2006; Laforest, 2011; Savard *et al.*, 2015; see also Chapter 1 in this volume by Sylvain A. Lefèvre and Peter Elson).

With its avowed intentions to engage with policy and to try to influence certain development trajectories within the region, the CIP partnership also signals philanthropy’s concomitant rise to greater prominence within regional governance networks. In Montreal as elsewhere, philanthropic foundations are increasingly recognized and sought out for their role in these spaces of networked governance (Jung & Harrow, 2015; Funders’ Forum on Sustainable Cities, 2016). As Jung and Harrow (2015) contend, foundations’ resource independence allows them a high degree of self-organization, which in turn lends them a stronger influence, relative to their size and numbers, within complex governance processes. Observers of philanthropic foundations’ increasing presence and power in these spaces have consistently raised issues of legitimacy, transparency and accountability (Jung & Harrow, 2015; Lefèvre & Berthiaume, 2017). CIP partners would do well to engage proactively with these issues, in dialogue with the CIP’s proponents and detractors, and seek to articulate their understanding of their social licence to occupy these spaces and of their corresponding accountabilities.

Implications for philanthropy and philanthropic practice beyond the CIP

For most key informants consulted in the original study that helped to shape this chapter, beyond any results and learnings that the CIP engenders for its partners during its 5-year span, the initiative's real interest lies in the ripple effects that it has beyond itself.

1 For some, the CIP is first and foremost a philanthropic action model (co-investment with joint strategy) that should be scaled out to augment and sustain foundations' support for community change efforts. Alongside the benefits (greater coherence, increased impact) that CIP partners associate with funder collaboration, a few project stakeholders and external key informants noted that funders working together can also have perverse effects.

Indeed, issues about the boundaries of the CIP – where it starts and leaves off, what's in and what's out – are already being felt within communities. Organizations in some neighbourhoods already had an existing tradition of relationships with specific CIP foundations before the CIP began. Since the CIP's inception, ambiguity now surrounds these relationships: what is to remain independent, and what is to be integrated into the CIP? Interests may diverge here, but the question invites a reflection regarding anticipated and unanticipated consequences.

By creating a single gateway for federating community support from most of the major philanthropic foundations active in Montreal, the CIP or its successor could have the effect of reducing the diversity of funding options available to communities, and in particular to those that have been turned down for CIP support. One respondent illustrated this point by referring to a similar experience observed elsewhere, where the bargaining power of grantees was reduced when they faced a united front of funders.

2 In the second ripple-effect scenario, the CIP serves as a demonstration project with the purpose of influencing public policies and practices that have an impact on community-led change. Here the evidence suggests that the intended influence rarely happens as planned, particularly in an era of constrained public budgets and funding programs. For one, philanthropic and government funding tend to occupy distinct and complementary niches in the comprehensive community-change field (Aspen Institute, 2012). Secondly, where comprehensive community initiatives have succeeded in influencing public policy and practice, this has not been because of a demonstration effect, but rather the result of active and focused advocacy efforts (Hopkins, 2015).

3

A more promising trend in the field of support for comprehensive community initiatives appears to be the emergence of structures that foster complementarity and linkage of philanthropic, public and private sector resources (Ferris & Hopkins, 2015). For now, these structures remain the exception rather than the rule, but their ability to leverage and aggregate more significant financial resources makes it possible to support more ambitious and longer-term initiatives.

Negotiating these kinds of hybrid structures requires philanthropic, private, social and state actors to have a shared understanding at the outset of their respective roles and competencies. However, it cannot be taken for granted that these different actors' understanding and assumptions about each other all line up (Healy & Donnelly-Cox, 2016). The Integration Initiative of Living Cities¹² illustrates the complexity inherent in this quest for a shared understanding. Launched by philanthropic foundations, the Integration Initiative sought to mobilize public sector partners to become co-sponsors of local community change initiatives. This met with less success than expected. Government stakeholders were inclined to see foundations as substitutes for state action rather than as collaborators, and less inclined as a result to define a distinct and complementary role that they themselves could play within the initiatives (Hecht, 2014).

Even when this shared understanding can be reached, stakeholders aiming to reach cross-sector alignment run up against challenges relating to the fundamental differences in each sector's operating environment. Different accountability pressures, different governance and regulatory environments establish limits as well as parameters of possibility to be explored (Knight *et al.*, 2017).

¹² <https://www.livingcities.org/work>

Conclusion

The CIP's central hypothesis is that:

- [...] the action of a certain number of funders, if it is well organized and coordinated among them, will allow for greater local and regional coherence and consistency and will have a more powerful collective impact than the isolated outcomes achieved so far.

Centraide, 2016a, p. 36 [our translation].

The implications of this hypothesis are different depending on where attention is focused. At one level, the CIP offers itself up as a means to influence how communities work together, nudging them to shift the emphasis of their collective action more towards outcomes, towards the changes to be accomplished.

At another level, for partners and observers of Montreal's CIP, the CIP has established itself as a test case for a number of other things beyond this – in particular the effects of new philanthropic strategies upon Montreal's place-based funding ecosystem and upon regional governance networks.

The lessons that the CIP offers up at the end of the project will be of interest to practitioners and scholars engaged with any of the above subjects. In addition, the CIP's ongoing development will be of interest to collective impact practitioners who are grappling with the challenges of openness and authentic engagement between funders and grantees.

Comprehensive community-change initiatives operate in complex environments: the issues that concern them are deeply interconnected, and they seek to engage a broad and diverse range of people, organizations and structures. Rather than measure these initiatives' success by their ability to achieve predetermined objectives, funders in these environments instead need to embrace learning itself as the return on their investment (Auspos & Cabaj, 2014). This is a difficult commitment to make and follow through on, as it challenges current notions of accountability and requires that funders accept new risks (Knight *et al.*, 2017). If the CIP is able to deliver on this intention for its own stakeholders, it should be able to generate lessons and insights that are nuanced and complex enough to allow the rest of the field to advance its own understanding.

Three key takeaways

1

A shift towards trust-based funding mechanisms is disruptive both for funders and grantees. Even when this shift comes as a response to grantee communities' wishes and desires, one shouldn't underestimate the adjustments required on all sides.

2

There are no pathways to sure outcomes. Instead of defining success by the reaching of specific change targets, leadership and partners should map out the shared learning intentions that all key stakeholders can get behind.

3

Clarity and alignment need to be sought early on around purpose, leadership and governance mechanisms; these points of shared understanding should be reviewed and revisited at regular intervals, and the funder circle expanded beyond foundations to include public-sector partners.

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