



Études de cas COVID-19

COVID-19 Case Studies

Réponses du secteur philanthropique canadien
Responses from Canada's philanthropic sector



PhiLab

RÉSEAU CANADIEN
DE RECHERCHE PARTENARIALE
SUR LA PHILANTHROPIE

À propos du PhiLab

Le Réseau canadien de recherche partenariale sur la philanthropie (PhiLab), est un Réseau de recherche sur la philanthropie au Canada dont le siège est dans le centre-ville de Montréal, sur le campus de l'Université du Québec à Montréal (UQÀM).

Il 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". Après une première phase de financement de 2013 à 2017, le financement a été reconduit sous le nom "Evaluation 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 partenariale, de partage d'information et de mobilisation des connaissances sur la philanthropie et plus précisément les fondations canadiennes.

Le Réseau est divisé en plusieurs centres régionaux au travers du Canada et travaille en étroite collaboration avec des unités de recherche à l'international. Il regroupe dans ses rangs: des chercheurs-es, des décideurs-es et des membres de la communauté philanthropique à travers le monde afin de partager des informations, des ressources et des idées.

About PhiLab

The Canadian Philanthropy Partnership Research Network (PhiLab), is a Canadian research Network on philanthropy with a head office in Montreal, on the campus of Université du Québec à Montréal (UQÀM).

The project was originally thought-up in 2014, in the context of a granting proposal for a three-year SSHRC Partnership Development project entitled "Social Innovation, Societal Change, and Canadian Grantmaking Foundations". After a first funding period from 2013-2017, the funding was continued under the name "Evaluation of the role and actions of Canadian grantmaking foundations in response to social inequalities and environmental challenges."

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

The Network is divided into several regional hubs across the country and works in tight collaboration with international research units. 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.

Le projet

In an attempt to provide a preliminary overview of responses to COVID-19 within the Canadian philanthropic community, PhiLab has initiated a series of small case studies evaluating recent initiatives in the field. The research was conducted by Isidora G. Sidorovska of the Ontario Hub and Charles Duprez of the Quebec Hub, with the support of Manuel Litalien, Nipissing University, and Jean-Marc Fontan, UQAM.

The project

Afin de donner un aperçu préliminaire des réponses à COVID-19 au sein de la communauté philanthropique canadienne, le PhiLab a lancé une série de petites études de cas évaluant les initiatives récentes dans ce domaine. La recherche a été menée par Isidora G. Sidorovska du PhiLab Ontario et Charles Duprez du PhiLab Québec avec le soutien de Manuel Litalien, Nipissing University, et Jean-Marc Fontan, UQAM.

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Étude de cas

Le Consortium philanthropique COVID Québec

Septembre 2020

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Étudiant à la maîtrise,
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Dans la présente étude, nous décrivons l'initiative mise en place par un petit noyau de fondations philanthropiques québécoises en réponse à la COVID-19.

Les acteurs de l'initiative 'Consortium philanthropique COVID Québec'

Quatre fondations sont à l'origine du 'Consortium philanthropique COVID Québec' (ci-après Consortium). Si ces dernières présentent des spécificités et des champs d'expertise propres, toutes sont préoccupées par l'enjeu de l'amélioration des soins de santé au Québec. Leurs dotations ont une valeur qui se situe entre 150 et 300 millions de dollars canadiens avec des budgets annuels d'opération qui oscillent entre de 3,5% et 7% des capitaux placés sur les marchés financiers. La taille de leur personnel varie, mais reste limitée à une petite équipe de moins de cinq personnes. Bien qu'elles puissent intervenir sur plusieurs causes philanthropiques, les quatre fondations membres du Consortium interviennent toutes, selon différents niveaux d'implication, dans le domaine de la santé.





Introduction

Le 24 mars, soit 10 jours après la déclaration de l'état d'urgence sanitaire, quatre fondations montréalaises se sont associées afin d'entreprendre une démarche pour se joindre aux efforts de lutte contre les causes de la pandémie. Rappelons que Montréal constituait à l'époque un des deux points chauds de la propagation du virus au Québec et allait devenir la zone métropolitaine la plus affectée par la pandémie sur l'espace canadien.

La volonté des quatre fondations (Consortium) – soit les fondations Molson, Jarislowsky, Trottier et Saputo – était d'aller au-delà des formes de réponse à l'urgence réalisées par nombre de fondations canadiennes et québécoises. Ces réponses consistaient principalement dans la mise sur pied ou la contribution à des fonds d'urgence et visaient également un assouplissement des règles entourant l'utilisation des dons déjà réalisés et un processus rapide pour l'allocation de nouveaux dons en lien avec l'urgence sanitaire. Cette voie de travail des fondations favorisait une mise en circulation de capitaux à un moment où l'accès à ces derniers se refermait en raison de l'arrêt des activités économiques jugées non essentielles. Cette mise en circulation était d'autant plus importante qu'il fallait compter un délai pour que les mesures d'aide des gouvernements fédéral, provinciaux et territoriaux deviennent effectives. À titre indicatif, les activités économiques furent grandement ralenties à partir de la troisième semaine du mois de mars et le nouveau programme d'aide aux particuliers, la Prestation canadienne d'urgence (PCU), fut rendue accessible le 6 avril.

Comme réponse, les membres du Consortium ont décidé de se doter d'une stratégie de travail novatrice visant à diminuer ou à enrayer la propagation de la maladie.

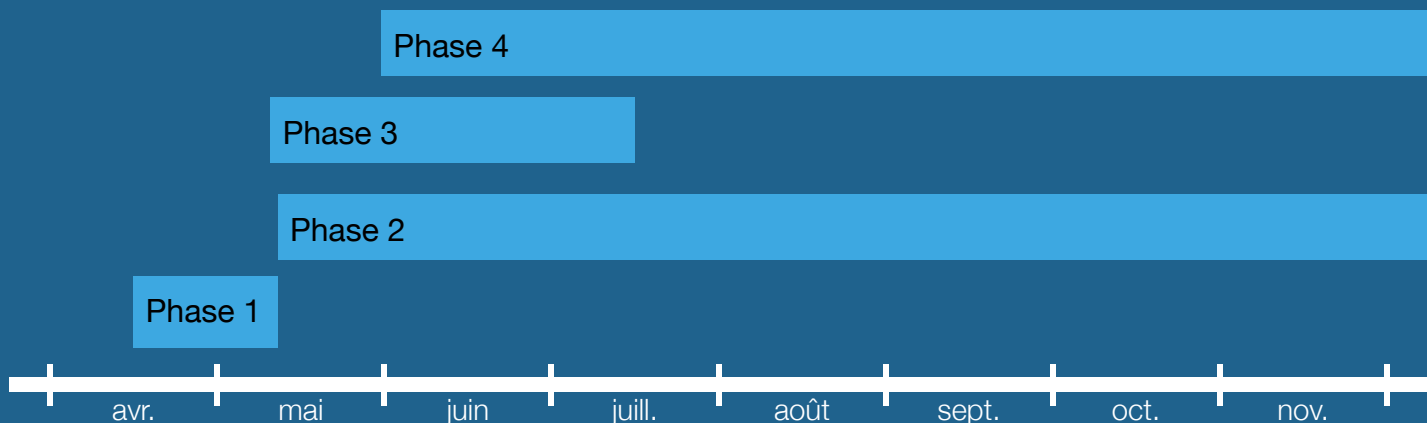
Au tout début de cette nouvelle collaboration, les premiers échanges entre les membres du Consortium ont conclu à l'importance de se doter d'une bonne capacité d'action. Il fallait donc dégager des fonds pour faciliter la structuration d'une stratégie d'action. Ces fonds devaient permettre l'embauche d'une ressource professionnelle et délimiter une enveloppe financière pour soutenir les interventions à venir. De plus, le Consortium s'inspire rapidement du modèle collaboratif de travail mis en place par le Projet Impact Collectif (PIC). Le PIC regroupe neuf fondations québécoises et trois partenaires, à savoir : la Direction de la santé publique de Montréal, la Ville de Montréal et la Coalition des tables de quartier de Montréal. Le PIC est coordonné par Centraide du Grand Montréal. Les membres du Consortium ont conclu qu'il leur serait nécessaire de confier à une ressource organisationnelle philanthropique le soin de coordonner la gestion du projet.

Dans cette veine, le 31 mars, FPC a accepté de jouer le rôle d'organisme fiduciaire. Un processus de recrutement d'un professionnel a été entrepris par FPC et Félix-Antoine Véronneau¹ a été embauché. Il est entré en fonction à FPC le 16 avril en tant que coordonnateur des travaux du Consortium.

1: Félix-Antoine compte plusieurs années d'expérience dans l'action humanitaire, notamment en situation de crise sanitaire. Il a par exemple travaillé à Haïti sur le choléra et en Afrique de l'Ouest dans la coordination de la réponse contre le virus Ebola. Félix-Antoine dispose aussi d'une bonne connaissance du milieu philanthropique et de la ville de Montréal.

Mise en place de la stratégie d'action COVID-Québec

Mise en place de la stratégie d'action COVID-Québec



L'analyse des actions menées par le Consortium permet d'identifier quatre phases dans l'émergence et le développement d'une stratégie d'action fondée sur une approche territoriale et thématique. La première phase, du 16 avril au 8 mai 2020, a pris la forme d'une **analyse diagnostic de la situation générée par la propagation de la pandémie**. La deuxième phase, à partir du 8 mai est toujours en cours, s'est traduite par une **concrétisation des leçons qui se dégagent de l'analyse diagnostic et de la réalisation des premiers investissements thématiques**. La troisième phase, du 6 mai au 15 juillet, correspondait au **développement d'une action territoriale dans l'un des arrondissements de Montréal, celui de Montréal-Nord**. Un premier versement de fonds a été effectué pour appuyer le travail à l'échelle locale. Enfin, la quatrième phase, à partir du 29 mai, est en cours. Elle repose sur un **partage de connaissances permettant le déploiement du modèle territorial d'action sur d'autres territoires de la région métropolitaine de Montréal et le transfert d'expertise à l'extérieur du Québec**.

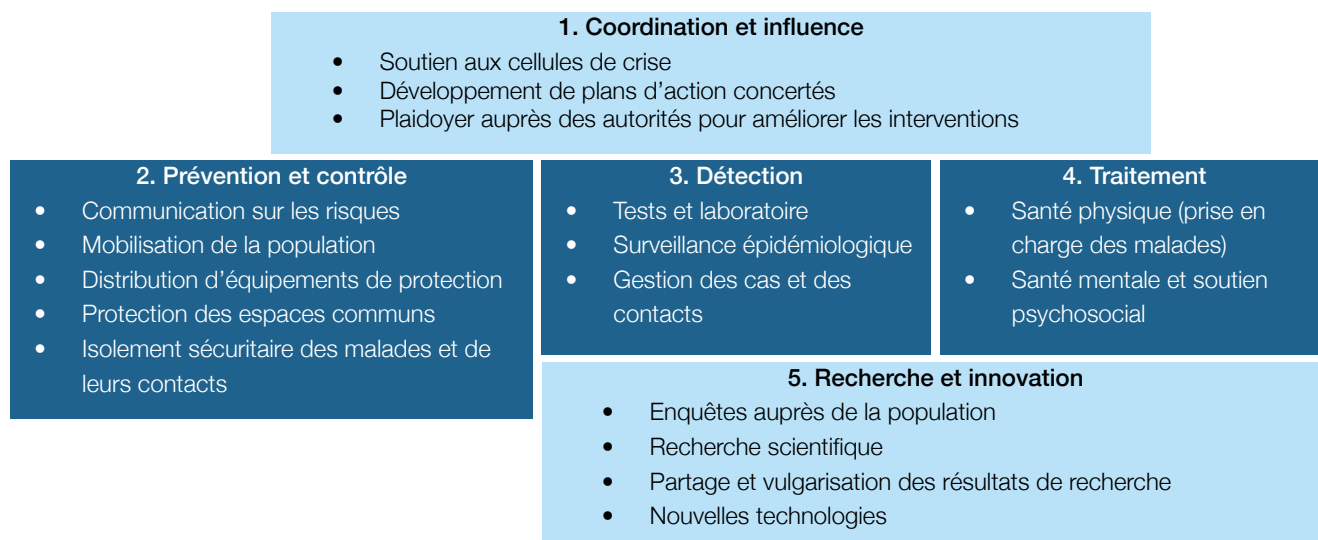
Mise en place de la stratégie d'action COVID-Québec

1. Analyse diagnostic

De l'analyse diagnostic réalisée, cinq types d'intervention y sont identifiées et fournissent un cadre d'intervention pour lutter contre la pandémie.

- 1. La coordination et l'influence** : il s'agissait de s'appuyer sur le travail réalisé par des cellules de crise à l'échelle locale ; de proposer la production de plans d'action concertés ; de faire un travail d'influence auprès de différents paliers d'autorité;
- 2. La prévention et le contrôle des infections** : ce volet de travail relève de mesures sociosanitaires en matière d'information sur la maladie, de mobilisation de la population sur les risques et les comportements préventifs à adopter, de distribution de matériel ou d'équipements de protection, etc.;
- 3. La détection de cas** : cette dimension de travail porte sur les actions à prendre pour améliorer les mesures de dépistage de la maladie, pour suivre l'évolution de la pandémie et pour avoir une gestion efficace des personnes affectées et des mesures préventives en matière de contact;
- 4. Le traitement des cas** : il s'agit d'appuyer les démarches visant la prise en charge des malades et d'offrir des services en matière de santé mentale et de soutien psychologique;
- 5. La recherche et l'innovation** : ce dernier volet concerne le développement des connaissances sur la maladie et sur les technologies à développer. Il vise aussi la circulation des informations et possiblement le soutien à la recherche.

Les cinq types d'intervention pour guider l'action de lutte contre la pandémie



Les cinq axes de travail identifiés par l'analyse diagnostic du coordonnateur du Consortium ont guidé le déploiement d'un ensemble d'actions menées par les quatre fondations. Ces actions furent regroupées en deux volets : l'un territorial et l'autre thématique.

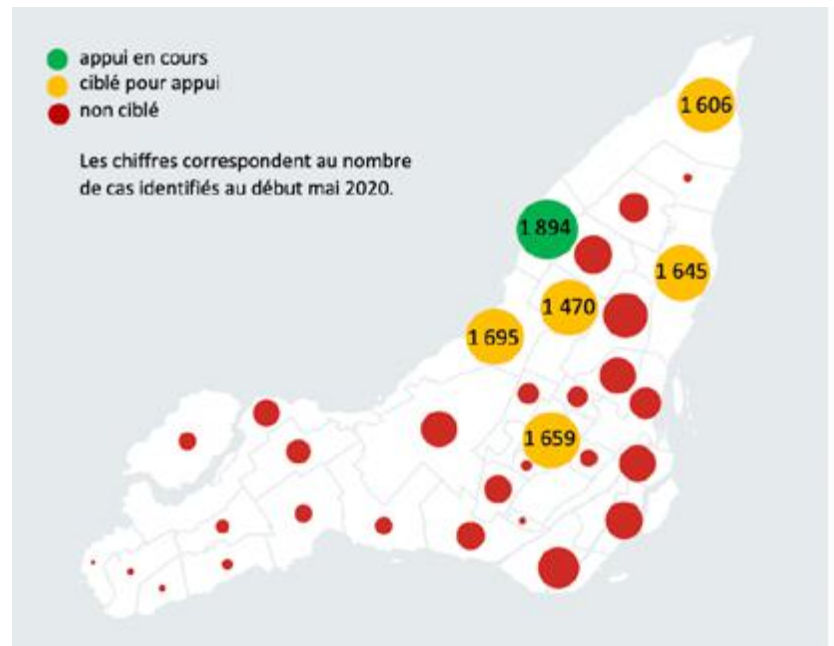
Mise en place de la stratégie d'action COVID-Québec

2. Fondement de l'approche territoriale

L'analyse diagnostic de la situation pandémique à Montréal a permis au Consortium d'identifier six arrondissements pour y développer une approche territoriale. Ces arrondissements étaient considérés prioritaires en raison du nombre élevé de personnes affectées par le coronavirus et aussi des taux importants de pauvreté. Fait à noter, ces arrondissements comptent aussi un nombre élevé de personnes appartenant à des minorités visibles.

Les arrondissements retenus étaient ceux de Montréal-Nord, d'Ahuntsic-Cartierville, de Côte-des-Neiges – Notre-Dame-de-Grâce, de Mercier – Hochelaga-Maisonneuve, Rivière-des-Prairies – Pointe-aux-Trembles et de Villeray-St-Michel-Parc Extension.

Carte de propagation de la COVID-19 sur l'île de Montréal



Source : Élaboration de FPC basée sur la cartographie des données de l'INSPQ de Le Devoir.

Ce travail sur six arrondissements visait des actions préventives auprès d'une population d'environ 700 000 personnes, représentant 35% des personnes habitant l'île de Montréal.

La voie territoriale de travail qui fut identifiée dans l'analyse diagnostic répondait au fait qu'en situation pandémique il est observé un foisonnement d'actions et un manque de coordination et de communication entre les acteurs, particulièrement lorsque ces derniers relèvent de différents niveaux d'intervention. Les entrevues ont confirmé que l'urgence sanitaire rendait difficiles les prises de recul et la coordination d'ensemble. D'où l'intérêt d'une approche qui permettrait une concertation planifiée et élargie à l'échelle d'un arrondissement et qui réunirait l'ensemble des acteurs autour de la définition d'une vision partagée du travail à faire.

Mise en place de la stratégie d'action COVID-Québec

3. Projet pilote

L'arrondissement Montréal-Nord a été la zone la plus affectée par la COVID-19. La forte concentration urbaine, le haut taux de pauvreté dans le Nord-Est et le Sud-Ouest de l'arrondissement, le nombre élevé de personnes appartenant à des communautés visibles, le nombre important de personnes âgées et de familles monoparentales ainsi que le désert en matière d'infrastructure sanitaire représentaient autant de facteurs propices à une intervention préventive pour stopper la propagation du virus. Le choix de soutenir ce quartier est apparu naturel pour initier une première intervention territoriale.

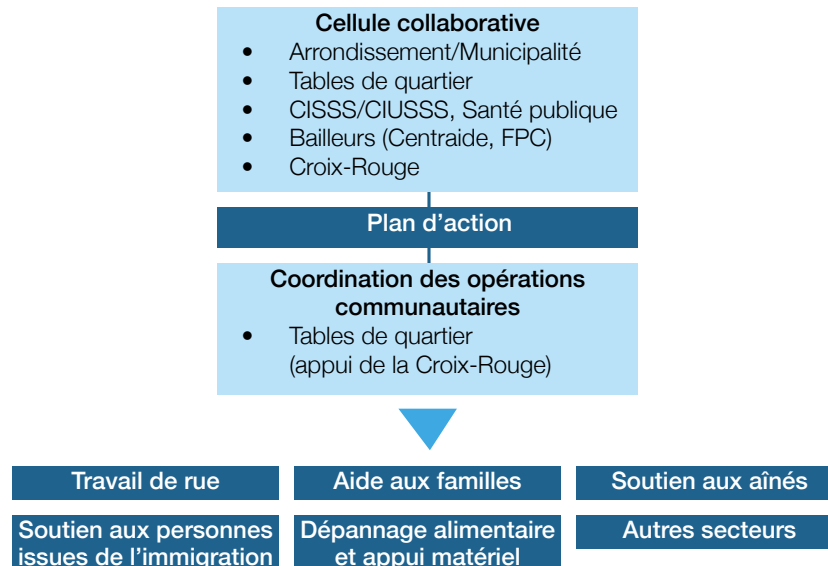
De concert avec les acteurs locaux, un premier modèle de plan local d'action face à l'urgence sanitaire a ainsi pris forme.

Sommaire du plan d'action de Montréal-Nord

1. Coordination et planification	<ul style="list-style-type: none">• Aménagement du centre de soutien opérationnel de la Table de quartier• Mise sur pied d'une équipe d'accompagnement du plan d'action concerté (analyse des besoins, renforcement de capacité, suivi-évaluation)	125 000\$
2. Prévention et contrôle	<ul style="list-style-type: none">• Soutien à l'organisation et aux opérations des équipes communautaires de sensibilisation (porte à porte, campagnes médiatiques)• Travail de proximité avec des clientèles spécifiques (aînés, jeunes, personnes issues de l'immigration)• Approvisionnement en masques réutilisables pour protéger la population et appuyer les campagnes de sensibilisation• Aménagement des lieux de travail des organismes communautaires (Architectes sans frontières)• Aide aux personnes en confinement (épicerie, achats et services)	248 000\$
3. Détection	<ul style="list-style-type: none">• Mobilisation des citoyens pour le dépistage par les organismes communautaires• Facilitation du transport vers les cliniques de dépistage• Développement d'une stratégie locale de dépistage (réalisé par l'Université McGill)• Ajout d'une clinique mobile	12 000\$
4. Traitement	<ul style="list-style-type: none">• Soutien psychosocial aux aînés	18 000\$
5. Recherche et innovation	<ul style="list-style-type: none">• Sondage sur les attitudes et comportements de la population de Montréal-Nord face à la COVID-19 (*déjà réalisé au coût de 17 000\$)	0\$

Mise en place de la stratégie d'action COVID-Québec

Modèle d'intervention privilégié pour les plans d'action



Sur le plan financier, une enveloppe de \$600 000 fut rapidement débloquée par le Consortium pour soutenir :

- la mise en œuvre d'une partie du plan d'action local d'urgence élaboré en réponse à la crise sanitaire (un montant de \$400 000 partagé équitablement entre les 4 fondations). Cela incluait les propositions de la Table de quartier de Montréal-Nord, du Centre d'action bénévole et de l'organisme Hoodstock;
- des actions concrètes spécifiques (appui psychosocial par exemple) avec une certaine flexibilité budgétaire (un montant de \$200 000 fut octroyé à la discrétion des membres du Consortium).

Le Consortium a bénéficié de la démarche liée à la production du plan d'action local d'urgence à la pandémie de l'arrondissement Montréal-Nord pour systématiser son approche. L'idée étant de généraliser les apprentissages de cette collaboration à d'autres territoires. À date la diffusion de l'approche semble porter ses fruits.

Les plans d'action en cours d'exercice sont ceux de :

- Montréal-Nord : en cours depuis le 15 juillet;
- Ahuntsic-Cartierville : en cours depuis le 17 août;
- Côte-des-Neiges : en cours depuis le 24 août;
- Saint-Michel: en cours depuis le 24 août;
- Mercier-Hochelaga-Maisonneuve : en cours depuis le 25 août;
- Villeray : en cours depuis le 1er septembre.

Les plans d'action en processus de validation sont ceux de :

- Parc-Extension : validation finale attendue le 28 septembre;
- Rivière-des-Prairies: validation finale attendue le 28 septembre.

À date, les investissements pour Montréal totalisent un financement de 2,4 M\$ pour une période de 4 mois.

Approche thématique

En réponse à la COVID-19, le volet thématique d'intervention du Consortium a permis de soutenir des initiatives locales stratégiques sur des thèmes spécifiques. Lorsqu'elles ont été jugées pertinentes, ces initiatives ont été promues dans les territoires visés, mais sans passer nécessairement par les plans locaux d'action d'urgence.

À titre d'illustration d'activités soutenues par des membres du Consortium, ou par d'autres fondations sensibilisées à la démarche, mentionnons le soutien financier accordé par la Fondation familiale Trottier à la plateforme CanCOVID. Cette dernière sert, entre autres choses, à diffuser les connaissances scientifiques sur la COVID-19 et à faciliter les mises en relation entre des chercheurs.



Exemples d'initiatives thématiques financées par les membres du Consortium ou des fondations sensibles à la démarche

Hoodstock, projet Immeuble en immeuble à Montréal-Nord

- Fondation J.A. Bombardier: \$25 000 (par l'entremise du Fonds COVID Québec)
- Fondation Chamandy: \$50 000
- Du consortium: Fondations Saputo et Trottier: \$28 000 chacune

Tous Ensemble

- Fondation Chamandy: \$30 000 (achat de tablettes pour l'Hôpital Maisonneuve-Rosemont et l'Hôpital général juif de Montréal)
- Du consortium, Fondation Saputo: \$62 000

Revivre

- Du consortium, Fondation Molson: \$100 000

CUSM

- Recherche sur la COVID-19, M[i]4 Fondation Trottier: \$1 000 000
- Projet CanCovid, Fondation Trottier: \$1 410 000

Financement



Le financement du volet territorial est assuré par une mise en réserve de 3 millions de dollars par les fondations du Consortium (\$500 000 de chacune des organisations membres du Consortium et \$1 000 000 supplémentaires de la Fondation familiale Trottier). Cette enveloppe territoriale vise le développement rapide de plans locaux d'urgence et une mobilisation communautaire. Selon les directives, les plans doivent être produits et déployés sur une période de quatre mois.

Le financement du volet thématique, quant à lui, est à la discrétion de chacune des fondations du Consortium. La souplesse dans ce volet permet la participation d'autres fondations à cette démarche. Il est possible de s'engager spécifiquement sur un projet pour lequel une ou plusieurs fondations se sentent interpellées par la cause ou par le territoire desservi.

Les cellules de crise peuvent mandater un organisme fiduciaire pour assurer une gestion des dons fournis par le Consortium. FPC assure la gestion des enveloppes auprès des organismes mandataires. Ces derniers sont souvent des tables de quartier (6 plans sur 9), mais aussi d'OBNL d'importance sur leur territoire (3 plans sur 9).

Pour chaque projet, un 'Comité de pilotage' est mis sur pied et FPC s'occupe de la signature des ententes. Ces dernières doivent inclure un plan d'action détaillé, un budget et indiquer les modalités de reddition de compte envisagées. Une fois les ententes établies, les tables de quartier font le lien avec les organismes impliquées dans la démarche.

La reddition de compte se fait un mois après la fin du projet, soit cinq mois après le versement de l'enveloppe attribuée. La reddition inclut un rapport final et complet en ce qui a trait à l'atteinte des objectifs, les défis relevés et les apprentissages réalisés. Il inclut aussi un rapport financier détaillé.

À la mi-parcours, les organismes financés par le Consortium doivent présenter un état d'avancement de leur plan d'action par rapport aux objectifs fixés et aux dépenses encourues. FPC a été désigné comme représentant du Consortium pour siéger à titre d'observateur aux rencontres bimensuelles des 'comités de pilotage' du plan d'action. FPC se réserve la possibilité de faire des visites terrain et peut procéder à des vérifications comptables.

La démarche initiée par le Consortium nous permet de dégager plusieurs constats.



Constat 1

Premièrement, même si les quatre fondations ne bénéficiaient pas d'une expérience spécifique de collaboration entre elles, la plupart avaient déjà travaillé avec d'autres fondations. Une culture de la collaboration était déjà ancrée dans leur approche de travail. De plus, elles portaient toutes en elles le désir de concrétiser cet esprit dans des projets communs qui permettraient de dessiner le visage de la philanthropie de demain. En effet, ces fondations font preuve d'une grande remise en question quant à la place et au rôle que devrait prendre la philanthropie dans la société. Toutes en appellent au regroupement pour maximiser leurs impacts.

Constat 2

Deuxièmement, cette collaboration s'appuie sur un ensemble d'éléments clés :

- le désir d'agir directement sur les causes par la prévention;
- une allocation de ressources financières dédiées à la collaboration qui s'ajoute aux allocations engagées par chaque fondation dans des fonds d'urgence;
- pour au moins une fondation, la volonté de dépasser le quota des 3,5% fixé par l'Agence de revenu du Canada;
- le développement d'une entente avec FPC faisant d'elle l'organisation fiduciaire pour assurer un démarrage rapide de la démarche;
- une étroite collaboration avec Centraide du Grand Montréal;
- la posture d'être à l'écoute des propositions émanant des milieux;
- une double stratégie d'intervention : à la fois territoriale et thématique.



Constat 3

Troisièmement, le réflexe de poser une action réflexive avant de passer à l'action, donc dans le but mobiliser des connaissances en vue de soutenir un éventuel modèle d'action, a été bénéfique pour les travaux du Consortium. L'analyse diagnostic a confirmé l'intuition initiale de focaliser l'action des fondations sur les causes de la pandémie plutôt que sur ses conséquences. Cela a aussi permis d'identifier des partenaires clés avec qui travailler (cellules de crise / Tables de quartier). Notons que peu d'organisations philanthropiques ont décidé de s'attaquer directement aux facteurs liés à la propagation du coronavirus. Sur ce point, l'action du Consortium est novatrice.

Constat 4

Quatrièmement, l'expérience et les compétences du coordinateur recruté par le consortium ont été décisives pour concevoir un plan territorial d'urgence qui suive l'approche d'actions en situation d'urgence humanitaire. Il faut rappeler qu'avant la première analyse de Félix-Antoine, il n'y avait pas nécessairement l'intention de s'attaquer aux causes de la pandémie. Cette nouvelle priorisation a été très vite comprise et suivie par les fondations du Consortium.

De même, le fait que Claire et Sylvie Trottier soient des chercheuses et que Claire soit spécialisée en microbiologie a joué dans la compréhension de l'urgence de la situation et l'importance de s'attaquer aux causes de la pandémie. Les deux sœurs ont apporté une lecture précieuse de la crise à l'ensemble du groupe et ont aussi facilité la prise de contact la communauté scientifique en santé et des conseillers scientifiques du gouvernement.



Constat 5

Cinquièmement, au sein du Consortium, le fait de se donner le pouvoir de s'engager seul ou avec d'autres sur un ou des financements a généré une approche souple, agile et flexible de travail. Il s'est ainsi dégagé un tronc commun d'intervention, via l'approche territoriale sur Montréal, et un continuum d'actions pouvant être développées en solo, en tandem ou avec d'autres fondations montréalaises non membres du Consortium (l'approche thématique). Notons que le continuum des actions spécifiques s'est défini en fonction des profils des fondations qui s'y sont engagées. Ce continuum d'actions pouvait ou non être lié à l'approche territoriale.

L'articulation entre le budget pour le volet territorial (3 millions) et celui pour le volet thématique a permis une bonne marge de manœuvre au consortium. Cela est très bénéfique pour l'agilité de l'action, permettant notamment d'entrer en discussion avec des acteurs qui ont de nouvelles propositions.

Toutefois, le transfert de fonds à des organisations communautaires locales n'a pas toujours été facile du fait que des organisations étaient des « donateurs non qualifiés », c'est-à-dire non reconnus par l'Agence de revenu du Canada. Le Consortium s'est donc ajusté en passant par FPC pour pouvoir rejoindre les donateurs



Constat 6

Sixièmement, il s'est agi de travailler à partir de deux postures. D'un côté, le Consortium a adopté une posture d'intervention complémentaire aux actions déployées les législateurs publics. Il ne s'agissait pas de se substituer à leur capacité d'agir. Lorsque des développements permettraient d'envisager une prise de relais par l'État, des représentations furent réalisées en ce sens (notamment pour les plans locaux d'urgence et la mobilisation communautaire);

D'un autre côté, le Consortium a opté pour une posture de travail favorisant l'écoute et le soutien aux démarches locales existantes (cellules de crise, Tables de quartier). Auour de ces cellules et Tables se trouvaient déjà rassemblées des expertises variées. Des réponses adaptées étaient souvent identifiées ou proposées par des organismes ou des institutions locales.



Constat 7

Septièmement, cette approche, misant sur l'engagement communautaire à partir d'une approche territoriale, est grandement facilitée lorsque les milieux locaux comptent sur des pratiques et un historique de concertation. Ceci est particulièrement le cas pour la Ville de Montréal où les cellules de crise et les Tables de quartier témoignent d'une importante tradition de concertation.

Constat 8

Huitièmement, pour FPC, cette expérience a permis de tester un nouveau rôle en endossant la fonction de maître d'œuvre accompagnateur d'une démarche collaborative entre fondations. Cette implication a été prise pour une période de temps déterminée (autour de six mois) afin d'assurer une gestion financière et opérationnelle rapide de la démarche collaborative du Consortium. FPC a donc participé à la mise en place d'un environnement organisationnel souple et plastique qui s'est greffé de façon périphérique au champ classique de son programme d'actions.

Sur certains dossiers ou actions philanthropiques à prioriser, comme celui de la réponse à l'urgence climatique ou de la santé mentale, cette expérience autour d'une réponse concertée et localisée à la COVID-19 est porteuse d'apprentissages qu'il serait bon de systématiser, à la fois pour FPC et pour le Consortium.

Pour remplacer FPC comme fiduciaire, la Fondation du Grand Montréal a été approchée et a accepté de prendre le relais. FPC souhaitait être en soutien au processus d'émergence, toutefois, disposant de capacités limitées, l'organisme estime plus judicieux d'agir pour faciliter l'amorce d'une collaboration et de se retirer une fois la collaboration bien en selle. De cette façon, FPC peut réinvestir son énergie pour faire émerger d'autres plateformes similaires sur d'autres enjeux sociaux. De plus, si FPC s'investissait trop dans de tels projets, sur le long terme, le risque serait que l'organisation finisse par devenir très opérationnelle au détriment de son rôle stratégique et politique.

Une autre plateforme collaborative, fondée sur le même principe, a récemment vu le jour. Elle porte sur l'enjeu climatique à Montréal. Elle regroupe 5 fondations qui ont toutes contribué à hauteur de \$10 000 pour débiter les travaux. Une autre cellule collaborative de travail est en voie de formation sur le thème de la santé mentale.



Case Study

The Consortium philanthropique COVID Québec

September 2020

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In this study, we describe the initiative implemented by a small core group of Quebec philanthropic foundations in response to COVID-19.

The actors of the “Consortium philanthropique COVID Québec” initiative

Four foundations are at the origin of the Consortium philanthropique COVID Québec (hereafter Consortium). While they all have their own specificities and fields of expertise, they are all concerned with the issue of improving health-care in Quebec. Their endowments have values ranging between 150 and 300 million Canadian dollars, with annual operating budgets varying between 3.5% and 7% of the capital placed on the financial markets. The size of their staff varies but remains limited to a small team of less than five people. Finally, although they may be involved in a number of philanthropic causes, each of the four foundations are involved in the health field, albeit to different degrees.





Introduction

On March 24, ten days after the declaration of the state of health emergency, a telephone meeting took place between the members of this same group on health. The purpose of this meeting was to take stock of the latest exchanges between members of this group and people from the Ministry of Health and Social Services. Two items were on the agenda. The first was the collaboration proposal suggested by Minister McCann. The second item, given the pandemic situation, was a collaboration to be set up between Quebec foundations to develop a preventive response to the health emergency.

During this meeting, four foundations joined forces to engage in fighting the causes of the pandemic. Montreal was at the time one of the two hotspots in the spread of the virus in Quebec and would become the metropolitan area most affected by the pandemic in Canada.

The four foundations (the Consortium)—the Molson, Jarislowsky, Trottier and Saputo foundations—resolved to go beyond the emergency response methods used by a number of Canadian and Quebec foundations. These responses consisted mainly in setting up or contributing to emergency funds while also seeking to loosening the rules surrounding the use of donations already made and to speeding up the process for allocating new donations related to the health emergency. This avenue of work by the foundations encouraged the flow of capital at a time when access to capital was diminishing due to the cessation of economic activities deemed non-essential. This was particularly important because there was a time lag before federal, provincial and territorial govern-

ment support measures became effective. For example, economic activity slowed significantly from the third week of March yet the new personal assistance program, the Canada Emergency Response Benefit (CERB), was not made available until April 6.

In response, Consortium members decided to develop an innovative working strategy to reduce or halt the spread of the disease.

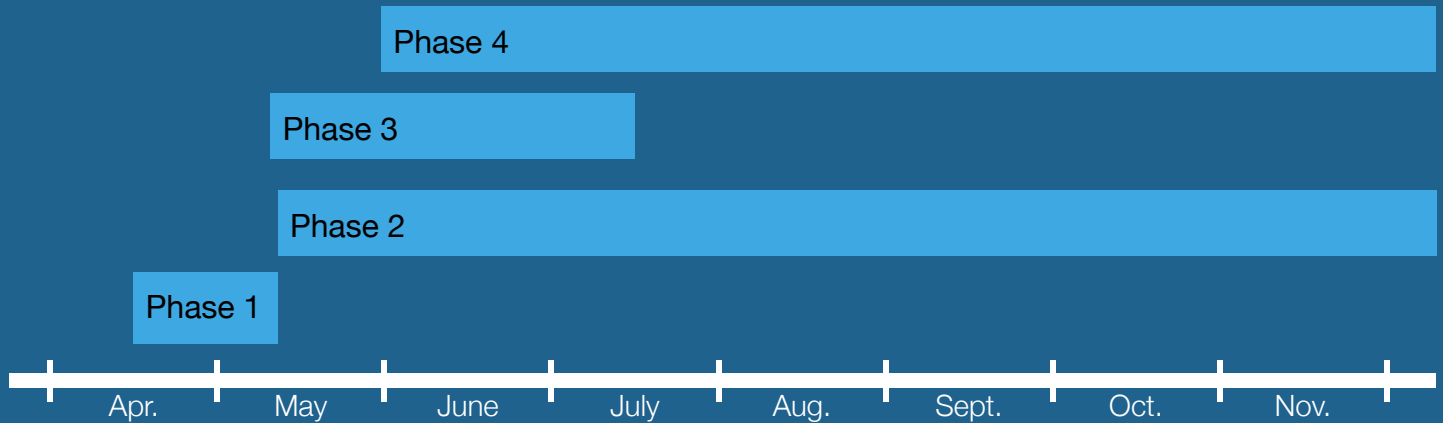
At the very beginning of this new collaboration, initial discussions among Consortium members concluded that it was important to build capacity for action. Funding was therefore required to facilitate the structuring of an action strategy. These funds were to enable the hiring of a professional staff member and to define a financial envelope to support future interventions. In addition, the Consortium was quickly inspired by the collaborative working model set up by the Collective Impact Project (CIP). The CIP brings together nine Quebec foundations and three partners, namely the Direction de la santé publique de Montréal, the City of Montréal and the Coalition des tables de quartier de Montréal. The CIP is coordinated by Centraide of Greater Montreal. The Consortium members concluded that they would need to entrust a philanthropic organizational resource with the coordination of the project management.

In this vein, on March 31, PFC agreed to take on the role of fiduciary body. A selection process for a professional staff was undertaken by PFC, resulting in the hiring of Félix-Antoine Véronneau¹, who joined PFC on April 16 as coordinator of the Consortium's work.

1: Félix-Antoine has several years of experience in humanitarian action, particularly in a health crisis. For example, he worked in Haiti on cholera and in West Africa in coordinating the response against the Ebola virus. Félix-Antoine also has a good knowledge of the philanthropic environment and of the city of Montreal.

Implementation of the COVID-Québec action strategy

Implementation of the COVID-Québec action strategy



The analysis of the actions carried out by the Consortium allowed identifying four phases in the emergence and development of an action strategy based on a territorial and thematic approach. The first phase, from April 16 to May 8, 2020, took the form of a **diagnostic analysis of the situation generated by the spread of the pandemic**. The second phase, starting on May 8 and still in progress, resulted in the **concretization of the lessons that emerged from the diagnostic analysis and the realization of the first thematic investments**. The third phase, from May 6 to July 15, involved the **development of concrete territorial action in one of Montreal's boroughs, Montréal-Nord**. An initial payment was made to support the work at the local level. Finally, the fourth phase, starting May 29, is still underway. It is based on the **sharing of knowledge that will eventually enable the deployment of the Consortium's territorial model of action in other areas of the Montreal metropolitan region and the transfer of expertise outside Quebec**.

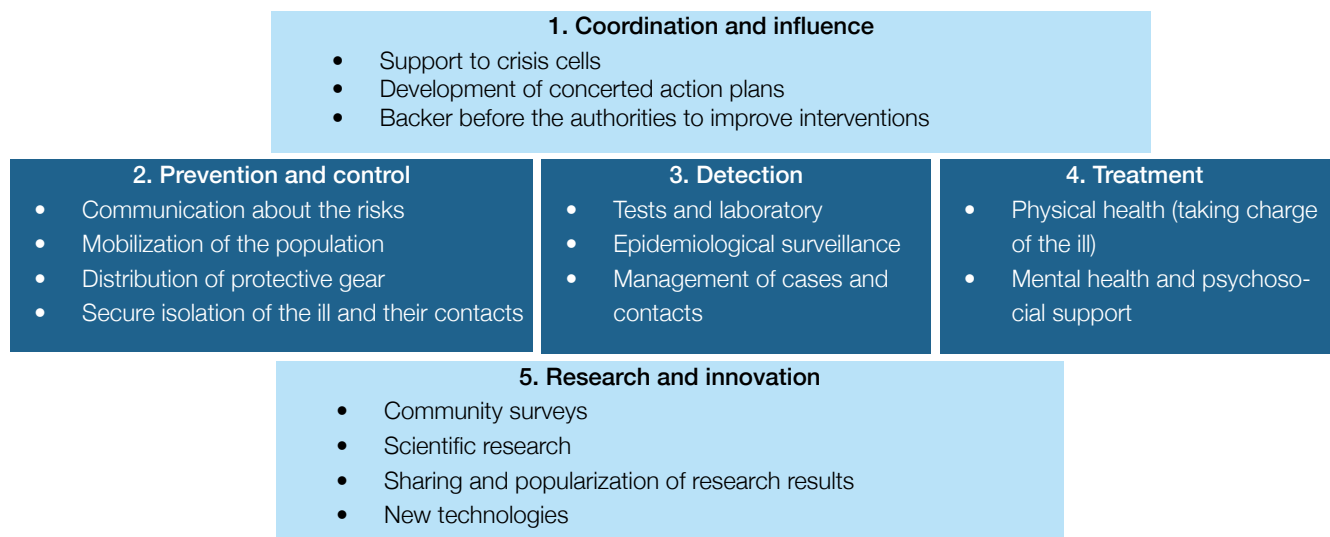
Implementation of the COVID-Québec action strategy

1. Diagnostic analysis

Five types of intervention were identified from the diagnostic analysis and provided a framework for responding to the pandemic.

- 1. Coordination and influence:** the aim was to build on the work carried out by crisis cells at the local level; to propose the production of concerted action plans; to work to influence different levels of authority.
- 2. Prevention and control of infections:** this part of the work involves social and health measures in terms of information on the disease; mobilization of the population on the risks and preventive behaviours to adopt; distribution of protective material or equipment, etc.
- 3. The detection of cases:** this dimension of the work focuses on actions to be taken to improve testing measures for the disease; to monitor the evolution of the pandemic; and to have effective management of affected persons and preventive measures regarding contacts.
- 4. The treatment of cases:** to support the management of patients and to offer mental health and psychological support services.
- 5. Research and innovation:** The latter concerns the development of knowledge about the disease and the technologies to be developed. It also aims at circulating information and possibly supporting research.

The five types of interventions to guide the response to the pandemic



The five areas of work identified by the Consortium coordinator's diagnostic analysis guided the deployment of a set of actions carried out by the four foundations. These actions were grouped into two components: one territorial and the other thematic.

Implementation of the COVID-Québec action strategy

2. Foundations of the territorial approach

The diagnostic analysis of the pandemic situation in Montreal allowed the Consortium to identify six boroughs for which to develop a territorial approach. These boroughs were considered a priority because of the high number of people affected by the coronavirus and also because of the high rates of poverty. It should be noted that these boroughs also have a high number of people belonging to visible minorities.

The selected boroughs were Montréal-Nord, Ahuntsic-Cartierville, Côte-des-Neiges– Notre-Dame-de-Grâce, Mercier–Hochelaga-Maisonneuve, Rivière-des-Prairies–Pointe-aux-Trembles and Villieray-St-Michel-Parc Extension.

Map of the propagation of COVID-19 on the island of Montreal



Source: Development of FPC based on the mapping of data from the INSPQ of Le Devoir.

This work spanning across six boroughs was aimed at a preventive action for a population of around 700,000 people, representing 35% of the people living on the island of Montreal.

The territorial path of work identified in the diagnostic analysis responded to the fact that in a pandemic situation there is a plethora of actions and a lack of coordination and communication between the actors, particularly when the latter operate at different levels of intervention. The interviews that Félix-Antoine conducted confirmed that the health emergency made it difficult to take a step back and coordinate the overall response. Hence the interest in an approach that would allow for planned and broadened consultation at the borough level and that would bring together all the players to define a shared vision of the work to be done.

Implementation of the COVID-Québec action strategy

3. Pilot Project

The Montreal-North borough was the area most affected by COVID-19. The high urban concentration, the high poverty rate in the northeast and southwest of the borough, the high number of people belonging to visible minorities engaged in health services, the large number of elderly people and single-parent families, and deficits in terms of health infrastructure were all factors calling for a preventive intervention to stop the spread of the virus. The choice to support this neighbourhood seemed to lend itself to initiating a first territorial intervention.

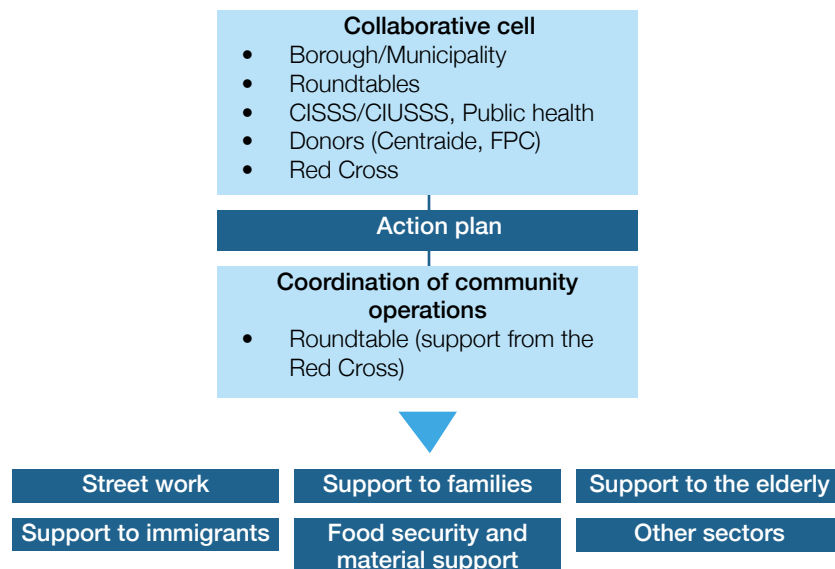
Hand-in-hand with local actors, a first model of a local action plan to deal with the health emergency took shape as follows.

Summary of the action plan for Montréal-Nord

1. Coordination and planning	<ul style="list-style-type: none"> • Set-up of the operational support centre of the neighbourhood table • Set-up of a support team for the concerted action plan (needs analysis, capacity strengthening, follow-up evaluation) 	\$125,000
2. Prevention and control	<ul style="list-style-type: none"> • Support to the organization and operations or community sensitization teams (door to door, media campaigns) • Outreach work targeting specific clients (elderly, youth, people with immigrant backgrounds) • Supply of reusable masks to protect the population and support the sensitization campaigns • Set-up of work spaces of community organizations (Architects Without Frontiers) • Support to people in confinement (groceries, shopping and services) 	\$248,000
3. Detection	<ul style="list-style-type: none"> • Mobilization of citizens for testing by community organizations • Facilitation of transportation to testing clinics • Development of a local testing strategy (realized by McGill University) • Adding of a mobile clinic 	\$12,000
4. Treatment	<ul style="list-style-type: none"> • Psychosocial support for the elderly 	\$18,000
5. Research and innovation	<ul style="list-style-type: none"> • Survey on the attitudes and behaviours of the population of Montréal-Nord regarding COVID-19 (*already realized at a cost of \$17,000) 	\$0

Implementation of the COVID-Québec action strategy

Preferred intervention model for action plans



A \$600,000 envelope was then quickly made available by the Consortium to support:

- The implementation of part of the local emergency action plan developed in response to the health crisis (an amount of \$400,000 shared equally among the four foundations). This included proposals from the Table de quartier de Montréal-Nord, the Centre d'action bénévole and the Hoodstock organization;
- Specific concrete actions (psychosocial support, for example) with some budgetary flexibility (an amount of \$200,000 was granted at the discretion of Consortium members).

The Consortium has benefited from the process related to the production of the local emergency action plan for the pandemic in the borough of Montréal-Nord to systematize its approach. The idea is to generalize the learning from this collaboration to other territories. To date, the dissemination of the approach seems to be bearing fruit.

The action plans in progress are those of:

- Montréal-Nord: in progress since July 15
- Ahuntsic-Cartierville: in progress since August 17
- Côte-des-Neiges: in progress since August 24
- Saint-Michel: in progress since August 24
- Mercier-Hochelaga-Maisonneuve: in progress since August 25
- Villeray: in progress since September 1

The action plans undergoing validation are those of:

- Parc-Extension: final validation expected on September 28
- Rivière-des-Prairies: final validation expected on September 28

To date, investments for Montreal total \$2.4 million for a period of four months.

Thematic Component

In response to COVID-19, the Consortium's thematic intervention component supported strategic local initiatives on specific themes. When deemed relevant, these initiatives were promoted in the targeted territories, but without necessarily going through local emergency action plans.

As an illustration of activities supported by Consortium members, or by other foundations that are aware of the approach, let us mention the financial support granted by the Trottier Family Foundation to the CanCOVID platform. The latter serves, among other things, to disseminate scientific knowledge about COVID-19 and to facilitate linkages between researchers.



Examples of thematic initiatives funded by members of the Consortium or foundations drawn to the approach

Hoodstock, “Immeuble en immeuble” project in Montréal-Nord

- Fondation J. Armand Bombardier: \$25,000 (through Fonds COVID Québec)
- Chamandy Foundation: \$50,000
- From the Consortium: Saputo and Trottier foundations: each \$28,000

Tous Ensemble

- Chamandy Foundation: \$30,000 (purchase of tablets for Hôpital Maisonneuve-Rosemont and the Jewish General Hospital of Montreal)
- From the Consortium, Saputo Foundation: \$62,000

Revivre

- From the Consortium, Molson Foundation: \$100,000

CUSM –

- Research on COVID-19 in relation to MI4, Trottier Foundation: \$1,000,000
- CanCovid project, Trottier Family Foundation: \$1,410,000

Funding



Funding for the territorial component is provided by a \$3 million reserve from the Consortium's foundations (\$500,000 from each of the Consortium member organizations and an additional \$1,000,000 from the Trotter Family Foundation). This territorial envelope is aimed at the rapid development of local emergency plans and community mobilization. According to the guidelines, the plans are to be produced and deployed over a four-month period.

Funding for the thematic component is at the discretion of each of the Consortium's foundations, a flexibility that allows other foundations to participate in this process. It is possible to commit specifically to a project for which one or more foundations feel committed to, be it with regard to the cause or the territory served.

The crisis cells can mandate a fiduciary organization to manage the donations provided by the Consortium. PFC manages the envelopes with the delegated organizations. These organizations are often neighbourhood tables (6 out of 9 plans) but also major NPOs in their territory (3 out of 9 plans).

For each project, a steering committee is set up and PFC is responsible for signing the agreements. The agreements must include a detailed action plan, a budget and indicate the reporting arrangements envisaged. Once the agreements are in place, the neighbourhood tables liaise with the organizations involved in the process.

Accountability occurs one month after the end of the project, or five months after the allocated envelope has been disbursed. The report includes a final and complete report on the achievement of objectives, challenges encountered and learnings achieved. It also includes a detailed financial report.

At mid-term, Consortium-funded organizations must submit a progress report on their action plan in relation to the objectives set and the expenses incurred. PFC has been designated as the Consortium representative to sit as an observer at the bi-weekly meetings of the action plan steering committees. PFC reserves the right to make field visits and may carry out financial audits.

The approach initiated by the Consortium has enabled us to make several observations.



Statement 1

First, even though the four foundations did not have specific experience of collaborating with one another, most had already worked with other foundations. A culture of collaboration was already ingrained in their approach to work. Moreover, they all had a desire to translate this spirit into common projects that would help shape the philanthropy of tomorrow. Indeed, these foundations are showing a great deal of questioning about the place and role that philanthropy should take on in society. All are calling for consolidation to maximize their impact.

Statement 2

Second, this collaboration is based on a set of key elements:

- the desire to act directly on causes through prevention;
- an allocation of financial resources dedicated to the collaboration that is added to each foundation's commitment of allocations to emergency funds;
- for at least one foundation, the willingness to exceed the 3.5% quota set by the Canada Revenue Agency;
- the development of an agreement with PFC as a fiduciary organization to ensure a quick start to the process;
- close collaboration with Centraide of Greater Montreal;
- the position of being attentive to proposals from the community;
- a two-pronged intervention strategy, both territorial and thematic.



Statement 3

Thirdly, the decision to adopt a reflective stance before taking action, with the aim of mobilizing knowledge to support an eventual model of action, was beneficial to the Consortium's work. The diagnostic analysis validated the initial intuition to focus foundation action on the causes of the pandemic rather than its consequences. It also made it possible to identify key partners to work with (crisis cells, neighbourhood tables). It should be noted that few philanthropic organizations have decided to directly address the factors related to the spread of the coronavirus. In this respect, the Consortium's action is innovative.

Statement 4

Fourthly, the experience and skills of the coordinator recruited by the Consortium were decisive in designing a territorial emergency plan that follows the approach of actions in humanitarian emergencies. It should be remembered that prior to Félix-Antoine's first analysis, there was no intention to invest in emergencies. This new prioritization was very quickly understood and followed by the Consortium's foundations.

Similarly, the fact that Claire and Sylvie Trottier are researchers and that Claire is specialized in microbiology played a role in understanding the urgency of the situation and the importance of addressing the causes of the pandemic. The two sisters brought valuable insights into the crisis to the entire group and also facilitated contact with the health science community and government science advisors.



Statement 5

Fifth, the fact that the Consortium empowered itself to engage alone or with others on funding(s) generated a flexible, agile and responsive approach to work. This has led to the emergence of a common core of intervention, via the territorial approach in Montreal, and a continuum of actions that can be developed alone, in tandem or with other Montreal foundations that are not members of the Consortium (the thematic approach). It should be noted that the continuum of specific actions is defined according to the profiles of the foundations that have committed to it. This continuum of actions may or may not be linked to the territorial approach.

The division between a budget for the territorial component (3 million dollars) and a budget for the thematic component gave the consortium good room for manoeuvre. This ensures that the action remains agile, allowing it, for example, to enter into discussions with actors who have new proposals.

However, the transfer of funds to local community organizations was not always easy because some organizations were “unqualified donors,” in other words, not recognized by the Canada Revenue Agency.



Statement 6

Sixth, the aim was to work:

- in complementarity with the actions of public legislators rather than as a replacement for their incapacity to act. In the case developments that would warrant the state to take over, representations have been made to this effect (particularly for local emergency plans and community mobilization);
- by listening to and supporting local initiatives (crisis cells, neighbourhood tables), which were already mobilizing expertise and foreseeing or publicizing appropriate responses proposed by local organizations or institutions.



Statement 7

Seventh, this approach, which relies on community involvement based on a territorial approach (the boroughs, in the case of Montreal), is greatly facilitated when local communities rely on practices and a history of cooperation. This is particularly the case for the City of Montréal, where the crisis cells and the neighbourhood tables reflect an important tradition of consultation.

Statement 8

Eighth, for PFC, this experience made it possible to explore a new role by taking on the function of managing a collaborative approach between foundations. This involvement was set for a fixed period of time (around six months) in order to ensure rapid financial and operational management of the Consortium's collaborative approach. PFC thus participated in the implementation of a flexible and malleable organizational environment that was added peripherally to the classic field of its action program.

On certain files or philanthropic actions to be prioritized, such as the response to the climate crisis or mental health, this experience around a concerted and localized response to COVID-19 is a source of learning that merits being systematized, both for PFC and for the Consortium.

To replace PFC as trustee, the Foundation of Greater Montréal was approached and agreed to take over. PFC wanted to support the emergence process; however, with limited capacity, the organization felt it would be more appropriate to act to facilitate the initiation of collaboration and to withdraw once the collaboration was well underway. In this way, PFC can reinvest its energy to build similar platforms for other social issues. Moreover, if PFC were to remain very involved in such projects over the long term, it would risk becoming operationally oriented as an organization, which would compromise its strategic and political role.

Another collaborative platform, based on the same principle, has recently emerged. It deals with the climate issue in Montreal. It brings together five foundations, all of which contributed \$10,000 to initiate the work. Another collaborative working group is currently being formed on the theme of mental health.

Pledge to GIVE5

September 2020

Isidora G. Sidorovska **University of Waterloo**

The focus of this report is the GIVE5 initiative, a campaign that aims to increase the total disbursement of charitable funds by Canadian foundations in response to the COVID-19 outbreak. It is based on a conversation with Bill Young, CEO of Social Capital Partners and the Bealight Foundation, as well as one of the initiators and members of the steering committee of the GIVE5 pledge. The case study also consulted relevant documents provided by our interviewee, and screened the GIVE5 web page, webinar and relevant social media activity around the initiative.

This report also draws on a conversation with Nancy Pole, Network Coordinator at the Collectif des fondations québécoises contre les inégalités, to complement our understanding on the uptake of this initiative in Quebec. Both conversations were conducted in late May 2020.

The report is organized into two sections. The first section provides a summary of the GIVE5 initiative and the rationale behind the campaign. Part two offers a brief discussion and analysis of its immediate outcomes and some of the larger conversations it has contributed to.

Description and Rationale of the Initiative

GIVE5 is an initiative among Canadian private and community foundations that have pledged to give at least 5% of their assets through charitable grants this year in response to the COVID-19 pandemic. It was organized as part of Giving Tuesday Now, a global movement for giving and volunteering, which was coordinated to support giving for COVID-19. The GIVE5 initiative aimed to have at least 100 Canadian foundations join the movement during the first week of May 2020. By the end of September 2020, a total of 69 foundations had signed the pledge. However, the campaign remains active and foundations are still able to sign up and take part.



Background and Rationale

The GIVE5 initiative is based on the recognition that the current crisis has had an immense impact on communities, especially on Canada's most vulnerable populations, with record high unemployment and growing food insecurity, as well as housing and mental health challenges. These mounting issues have increased demand on a charitable sector that is already struggling. At the same time, Imagine Canada has predicted a drop between \$4.2 billion and \$6.2 billion in charitable giving. This means that local community organizations face increased demand for services while encountering a substantial decline in financial support. The rationale behind the GIVE5 initiative is that it is necessary for the philanthropic community to attempt to balance out this loss in revenue by increasing their disbursement in response to the crisis.

The Income Tax Act requires Canadian foundations to disburse at least 3.5% of their assets to charitable purposes annually. This quota has steadily decreased from 5% in 1975, to 4.5% in 1984, to the current amount of 3.5% which was set in 2004.

According to calculations done by the GIVE5 steering committee, if each foundation in Canada were to step up and give 5%, it would result in an additional CAN\$700 million streamed to the charitable sector this year. That would represent a 42% increase over what the government mandates. While this amount does not come close to the predicted drop in revenue, it nevertheless signifies an important difference in the ability of the charitable sector to navigate the current crisis.

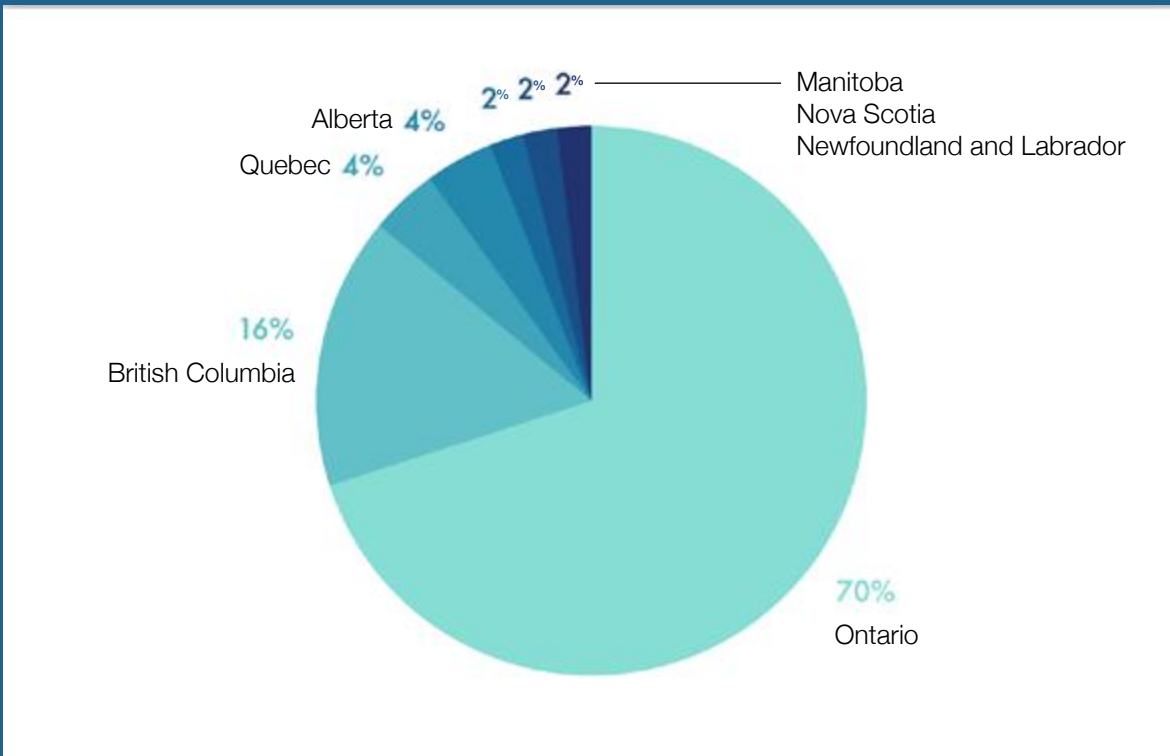
Discussion

The GIVE5 initiative has contributed to an ongoing conversation regarding what the disbursement quota should be, along with the question of foundation perpetuity, as well as how the totality of foundation assets can be put to better use for society. Another interesting aspect of the GIVE5 is the relative geographical concentration of its signatories, as foundations across Ontario seem to be prevalent in committing to the pledge. In this section we briefly review these aspects of this initiative.

1. Geographical Concentration

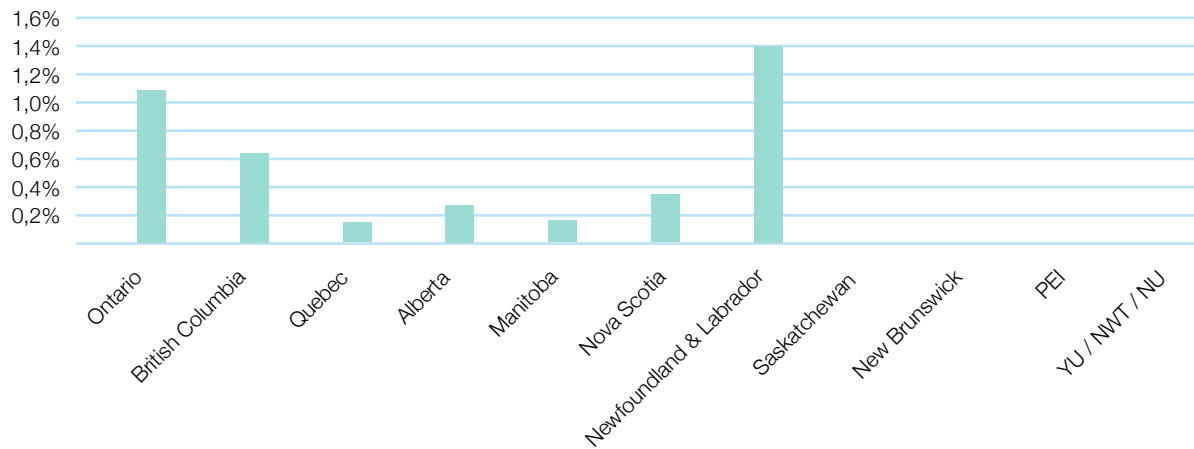
While GIVE5 is a pan-Canadian campaign, nearly 70% of its signatories are based in Ontario and about 16% are based in British Columbia. This leaves about 4.5% of signatories from each of Quebec and Alberta, and one signatory from Manitoba, Newfoundland and Labrador, and Nova Scotia each.

Geographical Concentration of GIVE5 Signatories



Even when compared to the total number of private and community foundations per province, Ontario sustains the second-highest rate of uptake, which is almost double the rate of British Columbia, four times the rate of Alberta, and about 7 times the uptake in Manitoba and Quebec. It is worth noting however, that with only one signatory of the GIVE5 pledge, Newfoundland & Labrador have the greatest rate of uptake among all provinces.

GIVE5 Signatories vs. Number of Private and Community of Foundations Per Province



Why has there been a bigger support for the initiative among Ontario-based foundations as opposed to the rest of the country?

Nancy Pole, Network Coordinator at the Collectif des fondations québécoises contre les inégalités (an open network of private and public foundations based in Quebec), notes that there are several aspects that demand further examination to understand the lesser degree of acceptance of the initiative in some parts of Canada. These include how effectively the information was spread across different regions of the country, but also the existence of previous conversations and agreements among foundations that would allow for a more rapid response in some provinces. She also notes that different regions may have approached the question of payout rates from different perspectives, or may find themselves at a different point in the process of engaging with the issue. For example, the Collectif had previously undertaken its own process of examining the payout rates as part of a larger reflection on foundations' fiscal privileges and responsibilities, that has led its members to align with a range of different positions.

In addition, some foundations have acted in 2020 to increase their payout rate to 5% and more in response to the COVID-19, but without necessarily signing the GIVE5 pledge. An example of this is the Lucie and André Chagnon Foundation from Quebec, which raised its granting commitment from \$350 million to \$500 during the next 5-year period, without explicitly joining the GIVE5 campaign.

Pole also adds that the actual ability of foundations to increase their giving might differ based on various foundation traits, including size. While bigger foundations may be able to make this commitment in the wake of the current crisis, smaller foundations may have held back during much of the year, waiting to see whether their small endowments would weather the stock market shock that presented early on.



2. Disbursement Quota

The last adjustment of the quota established in 2004 by the federal government was meant to reflect market rates of return on investment at the time thus allowing foundations to sustain long-term charitable giving without spending down their endowments. Yet, in the past 10 years, foundations have noted an average 10% financial return, an amount substantially over the current requirement, suggesting that an increase of the current threshold would not mean spending away foundation endowments. On the other hand, the 3.5% threshold has supported growing endowments, which subsequently allows foundations to ensure long-term contributions to social causes.

Critiques of the idea of foundations existing in perpetuity ask whether ensuring the ability of foundations to disburse grants over the longer term does not mean sacrificing the social impact that they can have today if they were to invest greater amounts to tackle current problems. For example, Boggild argues that it is more effective to invest in complex social issues early on, rather than sustaining endow-

ments to ensure long-term limited investments which essentially allow the issue to continue developing in the future. Malcom Burrows, one of the initiators of GIVE5, worries that “capital growth and foundation longevity have been given precedence over increasing immediate grants to charities”.

The issue of spending down versus perpetuity was also discussed among members of the Collectif des fondations. In addition to the arguments weighing short-term urgency against capacity to act over the longer term, the question was framed as a matter of justice: specifically, fiscal justice towards the generation that provides the initial tax subsidy, versus a form of intergenerational justice that could be afforded by longer-term endowment.

Finally, some data suggests that many foundations already disburse more than the minimum threshold. Boggild notes that when looking at the largest grant-makers in Canada, charitable grants have averaged at least 6% per year, which is well over the legal requirement. However, regulatory requirements are what sets the expectations and standard, and more research is needed to establish where individual foundations are on this scale.

3. The Totality of Philanthropic Assets

Finally, conversations surrounding the GIVE5 initiative also raise the question of what is being done with the totality of philanthropic assets and whether they can be put to better use for society. Young believes that foundations offer a bad deal for society. They are being given tremendous tax incentives to ensure only marginal charity donations of 3.5%. He finds Canadian tax laws among the most generous in the world. They allow foundations to use the

rest of their assets however they see fit, without insisting that the totality of philanthropic assets be invested in projects with a social impact, as opposed to traditional investments. A similar question was raised by The Circle on Philanthropy and Aboriginal Peoples in Canada. In mid-May this year, CEO Kris Archie started a virtual campaign on the #Other95, challenging people to share creative ideas regarding how the rest of philanthropic assets can be put to better use. While the campaign achieved limited duration and response, it did not go unnoticed in the philanthropic community.

Conclusion

COVID-19 crisis within our communities and the charitable sector in Canada. It is based on the understanding that foundations hold a key responsibility to ensure that Canada's public benefit organizations receive support as they face increased demand for their services alongside a notable decline in donations and fundraising revenue.

So far, the campaign has not succeeded in achieving its target of 100 foundations taking up the pledge; it has nevertheless managed to gain the support of almost 70 foundations, and secure an additional flow of CAN\$21.5 million to the charitable community.

Yet, the rationale behind the GIVE5 goes beyond immediate funding, as its initiators hope that it will also spark a public conversation around the policies that regulate foundations and foundation giving. These questions warrant additional study of the giving practices of Canada's foundations as well as a more comprehensive analysis of the short and long-term social impact of different operating models and approaches.



Acknowledgements

Earlier versions of this report have benefited from insightful comments and suggestions made by Adam Saifer, UQAM. The report is part of a PhiLab study on COVID-19 responses in Canada's Philanthropic Community led by Jean-Marc Fontan, UQAM and Manuel Litalien, Nipissing University.



Indigenous Peoples Resilience Fund: Building Infrastructure for Indigenous Philanthropy July 2020

Isidora G. Sidorovska
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This report presents a brief overview of the Indigenous Peoples Resilience Fund (IPRF): a multi-funder, Indigenous-led initiative established to support Indigenous communities across Canada as they respond to the current health crisis. In doing so, IPRF also contributes to the construction of an Indigenous philanthropic infrastructure in Canada.

The report is based on several conversations with key stakeholders in the process of establishing the IPRF. Two in-depth semi-structured interviews with individuals that started the initiative: Bruce Lawson, CEO of the Counselling Foundation of Canada; Victoria McKenzie Grant, Teme-Augama Anishnabai Kway (Woman of the Deep Water People) and Wanda Brascoupé, Kanien'keha, Skarù rë', Anishinabe, as representatives of the Indigenous Peoples Resilience Fund. Along with these conversations, the analysis also draws on conversations with Andrew Chunilall, CEO of Community Foundations Canada (the host partner of IPRF), and Jennifer Brennan, Head of Canada Programs at the Mastercard Foundation, which participated in initial funder consultations that preceded the establishment of the fund. Information on IPRF objectives, priorities, and future steps come from a draft version of the IPRF founding document, which was made available by the three key informants. The interviews were conducted in the first half of May 2020.

About the Initiative

The Indigenous Peoples Resilience Fund (IPRF) is an initiative set up by Indigenous knowledge holders in partnership with several non-governmental funders as a tool to support Indigenous communities during the current public health crisis. While the fund itself was created in response to the COVID-19 pandemic, it is not a temporary initiative; rather, it was conceived as a long-term instrument intended to contribute to the resilience of Indigenous communities across Canada beyond COVID-19. The IPRF is a natural next step in a process of ongoing dialogue between philanthropic organizations and Indigenous leaders that can be traced back to conversations preceding the development of The Philanthropic Community's Declaration of Action in 2015. In fact, several of the foundations that participated in these earlier conversations around establishing the IPRF were involved in writing the Declaration.

The IPRF is initiated by the expectation that COVID-19 will disproportionately affect rural and remote communities, due to their lack of access to capital and networks. It is this realization that generated a conversation between funders and Indigenous philanthropic knowledge holders on the need to immediately and strategically operationalize philanthropic support for Indigenous communities and shaped the current setup of IPRF as an Indigenous-led multi-funder, countrywide endeavour.



« The IPRF is initiated by the expectation that COVID-19 will disproportionately affect rural and remote communities, due to their lack of access to capital and networks »

Introduction

This report is organized into three sections. The first section provides an overview of the Indigenous Peoples Resilience Fund including its core objectives, as well as its overarching purpose and approach. The second section speaks to some of the key challenges experienced during the fund's implementation and highlights outcomes achieved and lessons learned so far. Part three provides an analysis of interview findings and identifies three specific aspects of the IPRF project that deserve further examination as components of an alternative model of collaboration between funders and beneficiaries.



Context

During our conversations with key informants, it became evident that widespread agreement on the necessity of a fund focused on Indigenous needs existed long before the pandemic. COVID-19 simply exposed and exacerbated the vast challenges already present in Indigenous communities, thereby magnifying the sense of urgency around creating such a fund.

COVID-19 is also believed to have acted as a catalyst for another aspect of this project: its unique status as an Indigenous-led initiative that places resources in the hands of Indigenous knowledge holders for them to decide on redistribution. Interviewees agree that while the determination and desire to support the development of Indigenous philanthropic infrastructure was present pre-COVID-19, it was not something that could have easily happened before the outbreak. The current crisis has generated a growing sense of urgency and enabled a decade-long conversation to be put into practice in less than a month's time.

As noted by one of our interviewees, the IPRF initiative is particularly vital because most Indigenous-led organizations operate as part of the third sector. This includes essential amenities such as education, healthcare, and other community services. An Indigenous-led fund would therefore be better equipped to identify and raise various issues faced by Indigenous peoples.

Another important feature of the IPRF is the ability to release resilience funding to both qualified and non-qualified donees. While working within the current regulatory framework, the fund introduces additional application and reporting requirements to ensure that non-qualified donees are also eligible to access funding. This represents a crucial step forward in rethinking some long-disputed granting policies. At the same time, it enables greater number of grass-root organizations and community nonprofits to benefit from IPRF support.

The purpose of IPRF is to provide resources that will build community resilience, which allows most fun-

ders to see their mandate within the concept. It also provides a strategic direction for IPRF, as it highlights a long-term goal beyond the current health crisis. The fund will specifically focus on issues related to education, food security, employment, housing, physical and mental health, connectivity, and justice. Geographically, it will target Indigenous needs throughout Canada and is not limited to specific groups or regions.

At this point, the types and amount of resources that will be contributed by each funder is not clear. Initial commitments have been made by several funders; however, the goal is to further appeal to private, community, and individual donors that might be interested in contributing.

In the immediate future, this money will not be held as an endowment. Instead, it will be distributed to address local needs. Besides providing grants, the funders in this collaborative are also expected to work cross-sectorally with government, charities, and private sector partners to address gaps in community infrastructure that, if filled, could increase Indigenous community resilience.

The IPRF is currently releasing support for its first round of projects, funding a total of 16 initiatives that will focus on food security, mental health, and internet connectivity. The fund will prioritize emergency responses to the pandemic until the end of September 2020. October 2020 to March 2021 will be dedicated to planning and preparing for the recovery period. Subject to the learnings of this initial phase, as of April 2021, the IPRF will work on its longer-term objectives: building stronger, more resilient, and better-connected communities.

The IPRF is intended to complement government actions and will avoid duplicating efforts and resources put in place by the state and other funders. While collaboration with the state and accessing federal funds might be an option for the future, at this point the IPRF does not plan on seeking federal funding.

Outcomes, Lessons, and Challenges

Interviewees suggested that the presence of ongoing conversations between philanthropic organizations, Indigenous peoples working in the sector and relationships with people and organizations outside the sector is what facilitated the rapid creation and launch of the IPRF. Trust, previous collaborations, mutual respect, and even friendship were also identified as core attributes that allowed the initiative to develop quickly.

At the same time, despite these well-developed relationships, there were differences that needed to be reconciled, as participants approached the process with distinct priorities, in various roles, and with diverse worldviews. These differences emerged both between the Indigenous and non-Indigenous led groups, as well as within each group itself.



1. Short-term vs. Long-term Priorities

The tension between short-term response to community needs emerging from the pandemic and the pressure for long-term thinking in addressing the crisis has been a key trait of the sector's response to the COVID-19 pandemic. For the IPRF this meant balancing between the need to immediately allocate funds in response to the COVID-19 crisis and allowing sufficient time for consultations and long-term thinking and strategizing. Some Indigenous leaders noted that the issues faced by their communities—while certainly exacerbated by the pandemic—were not new. As a result, they viewed the IPRF as a rare opportunity to create impact beyond the present crisis. This would involve taking the time to devise short-term responses while also tending to the establishment of the fund, including its governance structures, organizational priorities and operating procedures. This approach differed significantly from the desires of some funders who wanted to ensure the immediate release and availability of funds to local communities to address mounting needs. As a result, some funders eventually decided not to take part in the IPRF, instead prioritizing a more rapid distribution of resources to local communities. They, nevertheless, remained engaged in conversations with IPRF funders.

Outcomes, Lessons, and Challenges


2. Heterogeneity and Representation of Indigenous Community Needs

The establishment of IPRF as a geographically expansive initiative, open to support Indigenous communities across what is known as Canada, brought another set of challenges. While such an approach sought to include all Indigenous nations and regions, it also raised feasibility concerns due to differences in local community needs. Our interviewees noted that Indigenous peoples needs are often unrightfully assumed to be homogeneous, when in fact they are multiple, nuanced, and diverse. Therefore, they argued, the leadership of the fund must include appropriate representation to ensure that all groups and regions are equally represented in IPRF's objectives and priorities.

Another concern related to an Indigenous-led nationwide project was the question of how this representation would be mandated, and whether the

people involved in the advisory group had the permission and authority to speak on behalf of the communities they represent. While this question is beyond the scope of our study, it is important to note that it relates not only to national Indigenous infrastructure but also to Indigenous philanthropic infrastructure. As our interviewees noted, there is currently no representative body that can speak on behalf of Indigenous philanthropic organizations.

The IPRF has already established some mechanisms and tools to address the issue of representation within their project. In doing so, they highlight the importance of developing Indigenous philanthropic infrastructure, and the value of IPRF as one of the initial steps toward that goal. It is important to note that our respondents entertained the possibility that this initiative might eventually show that a cross-national approach is not a feasible strategy and that regional funds are better suited to address local community needs. These questions remain open for debate as participants in the process draw on recent experiences and evaluate the effectiveness of the initiative in the future.



« Our interviewees noted that Indigenous peoples needs are often unrightfully assumed to be homogeneous, when in fact they are multiple, nuanced, and diverse. »

Outcomes, Lessons, and Challenges



3. Benefits of Joint Philanthropic Ventures

Participation in a pooled fund is a unique experience for many funders, as it requires abandoning strict guidelines on funding priorities in favour of looking at broader outcomes that serve similar objectives. On the other hand, joint philanthropic ventures allow the pooling of modest individual donations to ensure more substantial impact. Judging by our conversations, there is an understanding that joint philanthropic ventures bring various tangible and intangible benefits to the organizations entering the process. In this sense the adjustments described above, including flexibility around funding priorities and procedures, serve a greater purpose.

One such tangential benefit is the opportunity to collaborate on complex and large-scale issues that funders are unable to tackle independently. For example, COVID-19 highlighted the lack of internet connectivity within Indigenous communities, especially in rural and remote areas. While this is not an issue tackled by the IPRF, its identification at the funders

table triggered conversations around how foundations can help address it in partnership with the government and the private sector, and some initial steps have already been taken in pursuit of this goal.

At this point we do not have sufficient information on how the IPRF initiative will unfold in the future, however, preliminary data suggests that joining forces between funders can—especially in times of emergency—act as an important mechanism to identify and address cross-cutting issues.

The IPRF is in the early stages of its development. As participants seek to tackle complex issues, they also face difficult choices. This includes deciding between a rapid response and allowing more time for strategizing. It also means attempting to speak to the range of issues faced by diverse Indigenous communities across the country. On the funders side, we can see that the decision to take part in a funding pool requires a specific kind of flexibility, but it also provides valuable opportunities for learning and developing new partnerships and collaborations. The next section highlights areas of interest for further research and study.

Discussion and Areas for Further Study



This review of the Indigenous Peoples Resilience Fund has outlined three unique aspects of the project that deserve further examination:

1. Importance of relationships, previous collaborations, and existing agreements in launching a new philanthropic initiative;
2. Tension between rapid responses and long-term strategizing in situations of urgency;
3. Directed vs. autonomous empowerment.

1. Relationships, Previous Collaborations, and Pre-Existing Agreements

The case of the IPRF points to the importance of established networks, relationships, and collaborations for the swift establishment of an emergency response project. As noted, one of the reasons the initiative was quickly supported by funders is the fact that it was conceived and discussed several years in advance. It also enabled different parties to engage with complex challenges and take important risks later in the process, despite a very short timeline.

The trust and mutual respect that were already present among the key stakeholders that initiated the IPRF underlines the value of well-established networks and previous collaborations in reconciling differences among multiple agents from various backgrounds.

In this sense, the current crisis functioned only as a necessary catalyst for elevating the IPRF from an abstract, though well-developed concept, to a reality. It also points to the fact that complex interventions can be considered a feasible response in emergency situations if the right conditions are in place.

Discussion and Areas for Further Study

2. Long-Term Strategizing vs. Short-Term Urgency

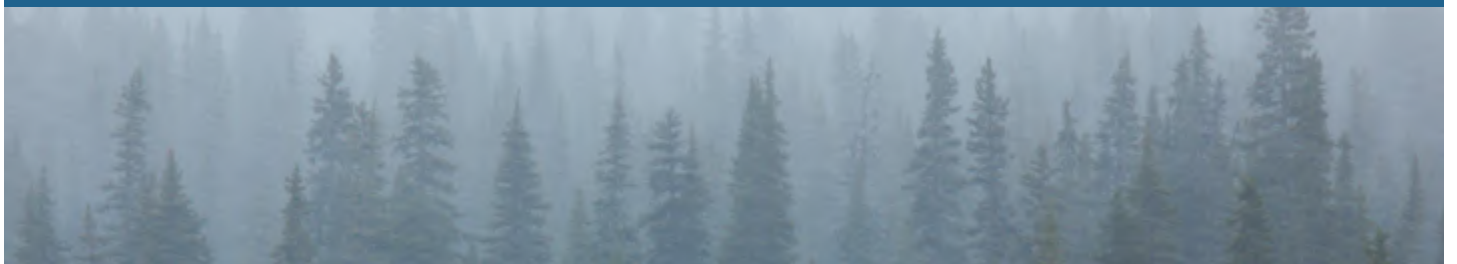
The COVID-19 outbreak has brought with an increased sense of urgency and growing calls for immediate action within the philanthropic sector. Organizations have responded by providing crucial emergency relief to communities. While the pressure to act with immediate release of emergency funds to Indigenous communities was felt by the IPRF as well, it decided to take a longer-term view and devise a response in a consultative and participatory manner. The IPRF managed to rapidly establish a governance structure and define organizational priorities and operating procedures to ensure the long-term sustainability of the initiative, that further enabled a more strategic approach response to community needs.

Such an approach was based on two realizations. First, there was a widespread belief that the social and economic issues created by the COVID-19 crisis were already present in Indigenous communities long before the current crisis. In other words, there already was a perpetual sense of urgency. Yielding to this urgency while failing to recognize the potential long-term benefits of the project would undermine its future impact. At the same time, IPRF was conceived as a nationwide and Indi-

genous-led endeavour, so any lack of democratic engagement with various parties would weaken its ability to create relationships and networks to serve one of its core objectives: IPRF contributions to Indigenous philanthropic infrastructure.

The second rationale for a long-term approach is the establishment of the IPRF as a key component of Indigenous philanthropy. While the fund initially had at its disposal CAD 1.4 million, there was strong faith that a bigger network of supporters will gather around this initiative. This meant that the IPRF had an opportunity develop and institutionalize organizational structures and procedures that will contribute to the establishment of Indigenous philanthropic infrastructure in the future. Additionally, this approach did not neglect the need for a prompt response, but rather delayed it, since the distribution of funds has been underway as of July 2020. Nevertheless, this was a major concern and deterred some of the funders from taking part in the project.

IPRF is an attempt to balance urgency alongside strategic interests to ensure that the long-term efficacy of the initiative is not compromised for immediate outcomes. Therefore, it is essential to further examine if reasonable delays to addressing strategic concerns in situations of emergency bring certain benefits when compared to more rapid responses in aid distribution.



Discussion and Areas for Further Study



3. Directed vs. Autonomous Empowerment

The case of the IPRF points to the importance of es-Empowerment is at the centre of many philanthropic endeavours that focus on building long-term capacities for future self-sufficiency. However, in its current practice, empowerment is often an externally aided process that leads to pre-identified outcomes and pre-established goals. On the other hand, the purpose of empowerment is autonomy, or the creation of capacity for future independence and self-sufficiency. As such, it must also include a right to self-determination. To achieve this, resources need to be provided without predefining the outcomes and the conditions of such development.

From the funders' perspective, the IPRF represents a different model of interaction with grantees, as funders have little influence over how and where resources will be allocated. According to one of our respondents, this process of handing over both capital and power is not easy for foundations. Yet, by allowing a self-directed process to unfold, this model of philanthropy enables a shift from externally directed empowerment to autonomy and self-development.

The series of case studies that this report is a part of show that, in response to the COVID-19 crisis, funders have given substantially greater autonomy to community partners in allocating and organizing emergency response funds. Funders have removed—or greatly reduced—application and reporting requirements, removed restrictions on previously restricted funds, and relied on local groups and organizations to direct their emergency responses.

As this crisis subsides, it is essential that the effectiveness of these approaches is compared to traditional grant making models. In this sense, the IPRF, along with other similar examples, can serve as a model for rethinking some existing philanthropic practices.



Conclusion

The IPRF is both simple and complex project that involves multiple stakeholders and tackles a range of issues that require careful consideration. As such, it might not be the obvious first choice as an emergency response during a crisis. However, this example shows how established trust, previous collaborations and partnerships—along with analysis and agreements that were already in place—can fast-track a project that would typically take years to establish. This suggests that complex, multi-actor projects can be an important resource in coping with unanticipated change and situations of urgency if the right conditions exist.

We can also see that despite perceived urgency, the Indigenous Peoples Resilience Fund has decided to take a more strategic, and a process-oriented approach. The fund has initially focused on establishing procedures and practices and has worked on developing capacity and infrastructure. However, it still managed to address immediate needs in the near future. As the project unfolds, it will be interesting to see whether balancing short- and long-term approaches is possible in times of crisis and what trade-offs accompany this approach.

Eventually, the IPRF also represents a unique model of collaboration, where philanthropic organizations cede their power to an autonomous, advisory council to respond to its own community needs. As such, the IPRF facilitates self-directed empowerment. Depending on its effectiveness, the IPRF warrants further exploration as a resource and model in designing future development interventions.

Acknowledgements

Earlier versions of this report have benefited from insightful comments and suggestions made by Adam Saifer, UQAM. The report is a part of a PhiLab study on COVID-19 responses in Canada's Philanthropic Community, led by Jean-Marc Fontan, UQAM and Manuel Litalien, Nipissing University.

Centraide du Grand Montréal

Une réponse pluridimensionnelle à l'urgence sanitaire et socioéconomique provoquée par la crise de la Covid-19

Juin 2020

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Cette étude de cas a été réalisée à partir d'informations extraites du site Internet de cette organisation et d'une entrevue effectuée auprès de Lili-Anna Pereša, présidente directrice générale de Centraide du Grand Montréal.



À propos

Centraide du Grand Montréal soutient le dynamisme des communautés du grand Montréal – Laval, Île de Montréal, Rive-Sud – particulièrement là où la pauvreté est préoccupante, et contribue à l'atteinte d'un impact collectif en faveur de l'amélioration des conditions de vie et de la réduction de la pauvreté.



Centraide
du Grand Montréal

Principales mesures prises par Centraide du Grand Montréal en réponse à l'urgence posée par la pandémie de la Covid-19

« Dès le début de la crise, nous avons décidé de verser l'allocation annuelle usuelle octroyée à tous les organismes que nous soutenons, qu'ils soient actifs ou non pendant la pandémie, et ce, afin de ne pas plus les fragiliser. Nous l'avons fait en indiquant que les organismes disposaient d'une marge de manœuvre dans l'utilisation des fonds et que les mesures de suivi seraient allégées. Pour répondre aux enjeux spécifiques de la Covid-19, trois nouveaux fonds ont été mis sur pied : le Fonds d'urgence Covid-19 de Centraide du Grand Montréal, le Fonds d'urgence pour l'appui communautaire (FUAC) du gouvernement fédéral et le Fonds Projet Jeunesse, résultat d'un partenariat avec la Fondation Lucie et André Chagnon.

De plus, la pandémie et la distanciation sociale requise pour ralentir sa propagation nous ont forcé à adapter nos modalités de gestion et à basculer rapidement dans le télétravail. Au nombre des mesures que nous avons prises, notons notre participation aux cellules de crise de Laval, Montréal et Longueuil, la création du Groupe d'allocations d'urgence (GAU), le développement en accéléré du Projet Radar et la ligne d'info-référence « 211 » suite au succès connu par cette dernière. »

- Lili-Anna Pereša





1. Le Fonds d'urgence Covid-19 de Centraide

Le fonds d'urgence Covid-19 a rapidement été mis sur pied. Dès le 25 mars, la plateforme fut ouverte aux organismes communautaires pour déposer des demandes de subventions, soit 2 semaines après le début du confinement. Ce fonds répond à l'impératif de mettre en place des « mesures exceptionnelles pour venir en aide à la population isolée et vulnérable du Grand Montréal ». Il permet d'allouer les fonds qui sont encore collectés par Centraide du Grand Montréal aux organismes qui en font la demande pour atteindre deux grands objectifs, qui lors de la première phase de quatre semaines, était: répondre aux besoins alimentaires d'urgence et renforcer les services d'écoute, aide et référence.

Comme Centraide du Grand Montréal a été l'un des premières organisations à allouer des fonds d'urgence alors que les demandes explosaient, notre organisation a été très sollicitée. Le gouvernement fédéral a certes procédé rapidement à l'annonce de différents fonds d'urgence, mais leur mise en place au Québec a pris presque deux mois après le début de la crise, et ce compte tenu de la nécessité d'une exemption à l'usuelle entente Ottawa-Québec. L'argent du fédéral pour le soutien à des banques alimentaires a seulement été versé au début du mois de mai. Le Fonds d'urgence de Centraide a donc fait du bridging financing. Notre Fonds a permis de faire le pont en attendant le versement des fonds gouvernementaux. Notre Fonds finance à 75% des organisations qui ne font pas partie du réseau des organismes appuyés traditionnellement par Centraide du Grand Montréal. Le Fonds en lui-même a été financé par la générosité des villes de Montréal, Laval et Longueuil ainsi que d'un grand nombre de donateurs, dont de grandes entreprises privées, des fondations privées ou des individus.

Ce Fonds d'urgence, en tant que fonds ouvert à tous les organismes, qu'ils soient partenaires ou non du réseau Centraide a été une première pour nous. Des organisations ont pu recevoir un financement d'urgence dans un délai très court en faisant la demande à l'aide d'un formulaire facile à remplir sur notre site web. Le processus de sélection comportait certains critères : être déjà financé par Centraide du Grand Montréal ou être financé par un partenaire public (municipalité, santé publique, ou autre). Dans le cas où l'organisme n'est pas financé par un partenaire public, il est demandé à ce dernier de « témoigner la capacité de l'organisme à mettre en œuvre le projet pour lequel l'aide financière est demandée et la rigueur de sa gestion administrative et financière ».

Le principal objectif du fonds d'urgence a été d'assurer la sécurité alimentaire des habitants du Grand Montréal. À la mi-mai, près de 400 organismes ont ainsi pu recevoir un financement pour des montants allant de \$1 000 à \$400 000. Un objectif secondaire était de répondre aux besoins en infrastructure portés par des organisations communautaires en ce début de crise. À titre indicatif, environ \$500.000 ont été alloués pour permettre à des organisations de se procurer des équipements téléphoniques ou d'adapter leur parc technologique ou d'avoir accès à des branchements internet à haute vitesse.

L'annonce le 21 avril du Fonds d'urgence (FUAC) établi par le gouvernement fédéral pour soutenir les organisations communautaires permet de prendre le relais le 19 mai. Nous avons alors réorienté l'objectif du Fonds en mettant sur pied une troisième phase, laquelle a été définie en fonction de l'évolution des besoins. Si l'accès à l'alimentation reste prépondérant, de nouvelles questions se sont ajoutées, comme celles concernant le logement. À la mi-mai, près de \$6 millions ont déjà été alloués sur un montant récolté supérieur à \$8 millions.

2. Le Fonds d'urgence du gouvernement fédéral

Le 21 avril le gouvernement fédéral a annoncé la création d'un fonds de \$350 millions en appui aux organismes communautaires à l'échelle canadienne. Le gouvernement de Justin Trudeau a confié la gestion de ce Fonds aux partenaires de trois grands réseaux : le nôtre (Centraide/United Ways Canada), celui des Fondations communautaires du Canada et la Croix-Rouge canadienne. Centraide du Grand Montréal n'a jamais eu à gérer des fonds du gouvernement fédéral, c'est une première. Nous nous sommes vu allouer une enveloppe d'un montant d'environ \$7 millions pour subvenir aux besoins des plus précaires sur le territoire du Grand Montréal. La répartition à travers le Canada a été faite sur une base populationnelle. Enfin, collaborer avec le gouvernement implique le respect de nouvelles conditions. Très précisément, l'argent géré doit être dépensé intégralement d'ici le 31 juillet, ce qui implique de travailler exclusivement dans l'urgence.



3. Le Projet jeunesse

De concert avec la Fondation Lucie et André Chagnon, un troisième fonds de \$2.5 millions a été lancé par Centraide pour tout le Québec. Il vise le soutien psychosocial et pédagogique aux jeunes marginalisés qui présentent des risques de décrochage scolaire. Avec la Covid-19, ces enjeux sont d'autant plus importants que poursuivre l'école à distance demande un accès à du matériel technologique – des ordinateurs ou des tablettes –, ainsi qu'à un service Internet de qualité.

Le Projet jeunesse permet de soutenir des organismes jeunesse afin qu'ils gardent contact avec les jeunes afin de leur offrir du support. Ce projet bénéficie du support d'entreprises de télécommunication comme Cogeco ou Telus. À terme, le projet projette d'atteindre 20 000 à 30.000 jeunes. Cet appui aidera les organismes jeunesse à rejoindre les jeunes isolés et marginalisés et à leur offrir un soutien pédagogique et psychosocial leur permettant d'aborder, entre autres, la poursuite de leurs études et la rentrée scolaire 2020-2021 avec le maximum de chances de réussite.

4. Le GAU! (Groupe d'allocations d'urgences)

Depuis le début du confinement, Centraide du Grand Montréal a complètement adapté son mode de fonctionnement pour accroître son agilité afin de répondre à la crise. Premièrement, il s'est agi d'assurer une continuité dans les aides apportées aux personnes en situation de vulnérabilité. Deuxièmement, il importe de répondre aux nouveaux problèmes liés à la crise sanitaire et socioéconomique. Troisièmement, il importait d'assurer que les organismes communautaires de première ligne reçoivent les ressources dont ils ont besoin.

Nos conseillers en développement social ainsi que le Groupe d'allocations d'urgence (GAU!) ont été en mesure de s'adapter à la nouvelle situation et travaille à un « rythme de guerre ». Le GAU! est l'instance décisionnelle. De plus, à Laval, Longueuil et Montréal, Centraide du Grand Montréal a été invitée à se joindre aux cellules de crise, et ce, de concert avec des fonctionnaires et les partenaires associés à ce dispositif. Certaines sous-cellules de crise ont choisi d'orienter leurs actions pour des objets précis, par exemple la sécurité alimentaire ou l'itinérance.

Nos sources d'information



Tableau de bord du 211



Les cellules de crise des villes



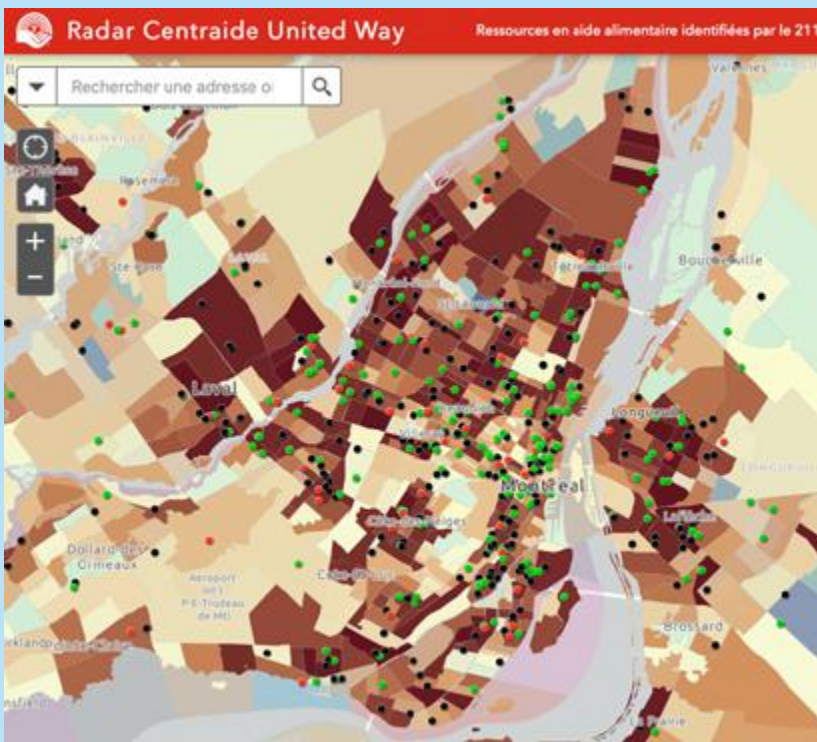
Nos conseillers en développement social

La réorganisation du travail a donc été effectuée efficacement et un nouveau de travail a été bâti. Par exemple, l'apport d'une gestionnaire de projets a permis une meilleure adéquation entre le processus d'allocations et l'outil de suivi des demandes. L'outil fourni des visualisations interactives et des capacités de business intelligence avec une interface suffisamment simple pour que les utilisateurs puissent créer leurs propres rapports et tableaux de bord. Un puissant « Power BI » nous donne le portrait des 900 demandes reçues (pour 17M\$) et les allocations versées pour les phases 1 et 2 de notre fonds. La crise nous a demandé une grande agilité et de la rigueur afin de répondre rapidement aux nouveaux enjeux qui se présentaient.

5. Le Projet Radar COVID-19

La version COVID-19 du prototype du Radar est un outil cartographique interactif qui recense et tient à jour les informations sur les organismes communautaires offrant des services en matière de sécurité alimentaire. En combinant différentes données, le Radar permet de voir si les organismes sont actifs et, s'ils sont subventionnés, par quels bailleurs de fonds. Grâce au Radar, nous serons capables de mieux observer les écarts de financement et ajuster nos investissements en fonction de besoins prioritaires. Par exemple, nous serons à même d'identifier les quartiers et les populations où peu de services sont offerts malgré une forte demande et un taux de pauvreté important. « Les organismes liés à d'autres enjeux sociaux tels : le logement, la santé mentale, la réussite éducative des jeunes, s'ajouteront graduellement aux versions subséquentes du Radar ».

Les données utilisées par cet outil proviennent du croisement entre les informations provenant de la ligne d'info-référence 211, des données sociodémographiques de Statistique Canada et d'Environics ainsi que des informations fournies par des organismes subventionnaires partenaires pour les sommes versées à des organisations communautaires.



Le Radar a vu le jour en plein cœur de la crise du coronavirus, il était toutefois déjà présent dans les esprits de Centraide depuis plus de deux ans, sans que l'organisme n'ait encore eu les fonds pour le mettre en place. La crise a donc été l'opportunité pour rendre réel ce projet et cela avant même d'avoir reçu les fonds nécessaires. La fondation Lucie et André Chagnon a participé financièrement à sa mise en place, en accordant une enveloppe qui dépasse les \$100.000. La fondation Mc-Connell est également en voie de se mobiliser pour appuyer le financement de Radar pour le rendre accessible aux grands centres urbains au Canada et éventuellement à tout le pays.

6. Le « 211 »

Le 211 est un service d'information et de référence accessible gratuitement. Il permet d'aiguiller les personnes dans le besoin vers les ressources sociocommunautaires adéquates. Le service est téléphonique et sur Internet. Une plateforme Web interactive a été mise sur pied. Le « 211 » couvre depuis deux ans le Grand Montréal. Le 211 est la référence pour tous les organismes ayant une fonction sociale et est principalement financé par la communauté métropolitaine de Montréal (CMM) et Centraide du Grand Montréal.

Les données recueillies par le 211 permettent d'établir des analyses statistiques précieuses. Il est alors possible de dresser un tableau en temps réel des besoins de la population. Le tableau de bord permet notamment à Centraide d'être dans une posture proactive en identifiant les communautés dans le besoin. Du 13 mars au 14 mai, il y a eu une augmentation d'environ 236% du nombre d'appels dans la Communauté du Montréal Métropolitain (CMM) par rapport à la normale. La majorité de ces appels concernaient un besoin d'aide alimentaire. Le site Internet a enregistré une augmentation de 30% des consultations. Les informations recueillies nous montrent que l'alimentation, l'aide à domicile et les questions liées au logement étaient, en début de crise, les principaux besoins non comblés dans la région du Grand Montréal.

De plus, le 211 permet de localiser les zones les plus à risques et de mieux cibler les aides à apporter. À titre indicatif, l'arrondissement Villeray-Saint-Michel-Parc-Extension a comptabilisé le plus de demandes de soutien pour la période du 13 mars au 14 mai avec 1301 appels contre seulement 38 à Westmount.



Conclusion

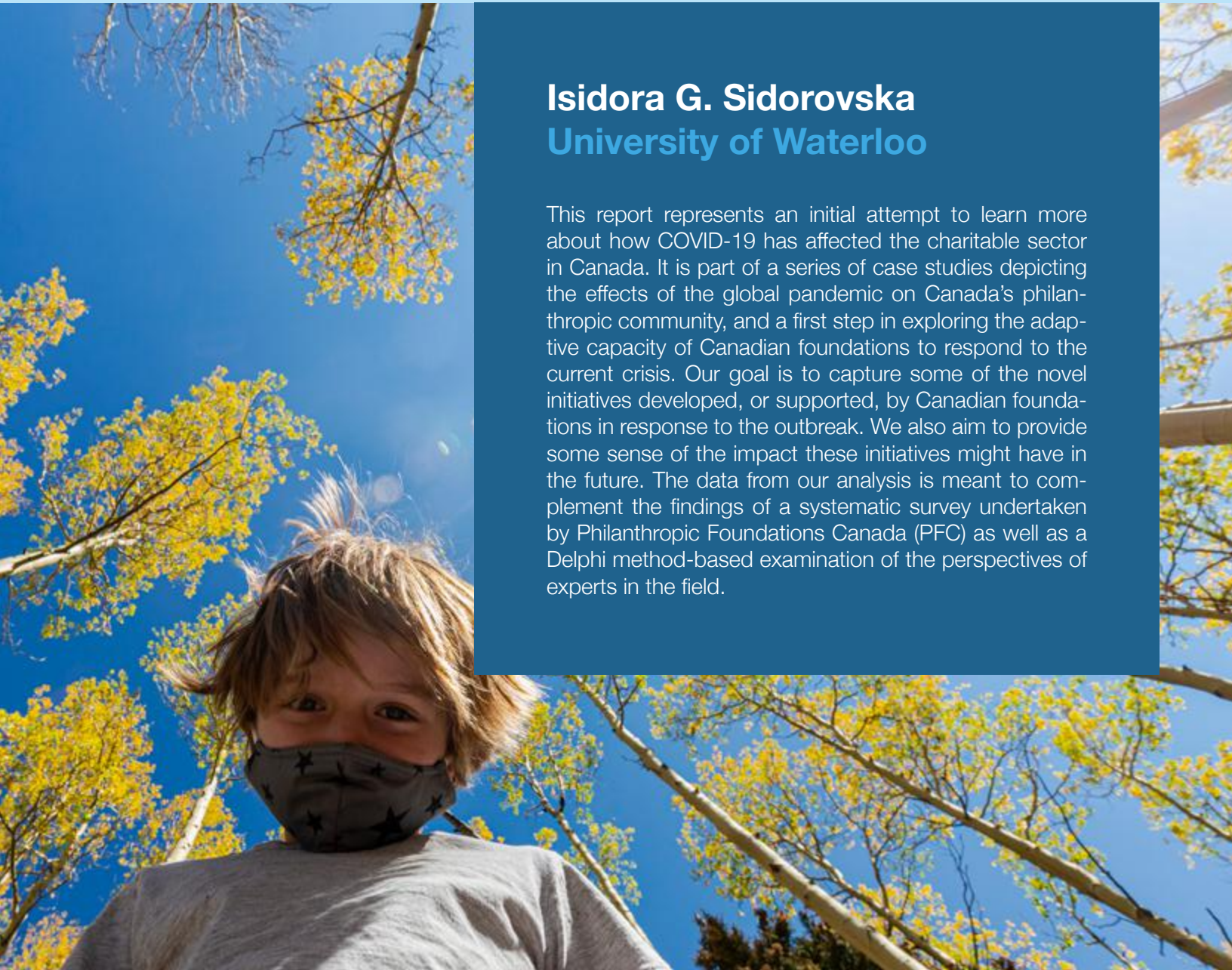
Si Centraide a principalement fait du bridging financing pendant la première partie de la crise sanitaire et socioéconomique, en attendant l'arrivée de fonds fédéraux, nous comptons désormais travailler davantage à partir de projets structurants. Par exemple, prenant la question de l'alimentation, la crise a révélé des lacunes en lien avec le transport de nourriture. Il existait peu de coordination entre les différentes parties prenantes de la chaîne alimentaire. Il importe donc de développer un mode efficace de coordination entre les nombreux partenaires privés, et sociocommunautaires. C'est ce que nous avons fait en urgence pour assurer une logistique de transport des denrées alimentaires sur le territoire. De nombreux enseignements et processus peuvent être tirés des collaborations et des partenariats nés au cœur de la tourmente. Nous comptons profiter de ces apprentissages pour structurer encore davantage la synergie entre les différents organismes et la capacité de cibler aux mieux les besoins.

En guise de conclusion, Centraide souhaite désormais miser sur une approche qualifiée de reaching out. En utilisant de façon appropriée les données issues des divers outils mis en place, tels que le tableau de bord du 211 et le Radar nous serons mieux en mesure d'identifier et de répondre aux besoins non comblés. Cela nous a permis de passer d'une logique de réactivité à un logique proactive.

Lawson Foundation: Responses to COVID-19 July 2020

Isidora G. Sidorovska
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This report represents an initial attempt to learn more about how COVID-19 has affected the charitable sector in Canada. It is part of a series of case studies depicting the effects of the global pandemic on Canada's philanthropic community, and a first step in exploring the adaptive capacity of Canadian foundations to respond to the current crisis. Our goal is to capture some of the novel initiatives developed, or supported, by Canadian foundations in response to the outbreak. We also aim to provide some sense of the impact these initiatives might have in the future. The data from our analysis is meant to complement the findings of a systematic survey undertaken by Philanthropic Foundations Canada (PFC) as well as a Delphi method-based examination of the perspectives of experts in the field.



Introduction and Context

The current report outlines the responses of the Lawson Foundation to the COVID-19 outbreak. It is based on a conversation with Marcel Lauzière, the foundation's President and CEO, about specific actions taken by the Lawson foundation. We use the conversation as a starting point to identify other relevant philanthropic initiatives developed in response to the COVID-19 pandemic.

Our conversation identified several initiatives undertaken by the Lawson Foundation. Some of these initiatives are individual or collaborative projects that the Lawson foundation has launched or adapted in response to the outbreak. Others are initiatives within the philanthropic community that the Lawson Foundation decided to take part in.

The report is organized in two parts. Part one provides a brief overview of the seven initiatives implemented by the Lawson foundation and the immediate rationale behind engaging in these projects. Part two presents my analysis and identifies key elements of the foundation's response that deserve further study. These include emergency aid practices, as well as new and emerging models of collaboration between foundations and grantees.

LAWSON FOUNDATION

About the Foundation

The Lawson Foundation is a Canadian family foundation that works to support the healthy development of children and youth. It was established in 1956 by the Honourable Ray Lawson and has an endowment of approximately CAN\$130 million. In addition to grant-making in support of local organizations, the Lawson Foundation engages in knowledge creation and knowledge sharing by bringing together individuals and groups working with, and on behalf of, children and youth to learn from one another. The Lawson Foundation also uses its financial assets to create social good through impact investing.

New/Adapted Initiatives

The London Community Foundation (LCF) COVID-19 Response Fund

The Lawson Foundation, which has its roots in London, Ont., has supported the London community since 2005. The LCF COVID-19 Response Fund is a collaboration between the Lawson foundation and the London Community Foundation that seeks to address local needs resulting from the current outbreak. Each foundation has contributed CAN\$300,000 to the fund. Following these initial contributions, the Westminster College Foundation—as well as other individual donors—have made additional contributions to the fund which now totals more than CAN\$1 million. The purpose of the LCF COVID-19 Response Fund is to provide rapid grants to local charities that complement ongoing efforts in the community. Funds are being distributed through an advisory council comprised of representatives of the LCF, the Lawson Foundation, and the Westminster College Foundation. The LCF Response Fund is continuing in the fall to enable prompt reaction to issues as they arise.



Pop-up Granting Teams

The pop-up granting teams are part of an initiative by the Lawson Foundation that set out to provide rapid support to local communities in the early days of the pandemic. The project relies on six community-led pop-up granting teams that were established across the country in a variety of different settings. The pop-up teams are made up of previous collaborators of the foundation and each pop-up team received CAN\$130,000 to disburse to community organizations.

The goal of the initiative is to have trusted community partners decide where emergency support should go in a timely manner. The organizations receiving the funding are usually not aware of the incoming support, as there have been no application nor reporting requirements. Initial grants ranging from CAN\$5000 to CAN\$25,000 were distributed within two weeks of setting up the pop-up teams. The project, however, remains active until the end of the year. So far, most of the funding has been allocated to front-line organizations such as food banks, women's shelters, and youth mental health centres.

The pop-up teams were established across different environments, including both urban centres and rural communities. A short survey will be set up by the Lawson Foundation later this year to gather feedback from grantees. Rather than focusing on grantee accountability, this survey will aim to help grant-making foundations learn from the project.

New/Adapted Initiatives

Ad-hoc Funding in Broad Impact Areas

In addition to the pop-up grants aimed at providing emergency support to communities, the Lawson Foundation set up two additional ad-hoc granting programs to support organizations working in the Foundation's broad impact areas.

The first program is allocating CAN\$800,000 to support urgent needs of organizations working with children and youth. This funding is, once again, unrestricted. It aims to support the development of new community initiatives or provide additional funding to support general operations or specific programs. The overarching purpose of the program is to guarantee sufficient cash flow to support recovery efforts among community partners.

The second initiative disburses another CAN\$800,000 to Indigenous organizations. It provides similar types of support as the first program, but with a specific focus on Indigenous organizations and communities. The purpose of the program is to ensure both Indigenous partner organizations and local Indigenous communities receive financial support to overcome some of the difficulties resulting from the current crisis.

The implementation of both programs is planned to continue until the end of the year, with 60% of the ad-hoc funding distributed so far. Recommendations for funding to the Board are made by staff and are based on ongoing conversations with grantees on immediate and long-term concerns regarding recovery and organizational sustainability.



Succession Planning

The Lawson Foundation is a private family foundation. In fact, five generations of the family have been involved with the organization. As part of its succession planning, the Lawson Foundation has traditionally educated the next generation of family philanthropists by placing them in charge of allocating small grants to community organizations.

In response to the current outbreak, the Lawson foundation directed the small grants funding towards the COVID-19 outbreak, repurposing an additional CAN\$100,000 to be allocated in support of local needs. While the amount is modest, it is expected that it will provide important learning opportunities for the next generation of philanthropists in the family, specifically regarding the management of philanthropic efforts during times of crisis.



Multi-funder Initiatives

Apart from undertaking new, or adapting existing, programs in response to the health crisis, the Lawson Foundation has also joined several multi-funder initiatives.

Letter to Grantees

The Lawson Foundation joined the growing chorus of philanthropic organizations temporarily modifying their model of collaboration with grantees. The purpose of these modifications was to ensure stability of cash flow in the sector and temporarily reduce administrative burdens to allow all organizational efforts to be directed towards a pandemic response. This was announced via a letter to grantees, sent to reassure partners that funding will be allocated according to previous agreements. The letter also informed grantees that the foundation would provide increased flexibility on spending the Lawson Foundation's funds. As a result, all funding received from the Lawson foundation would be categorized as "unrestricted", allowing grantees to use funds as they see fit during the crisis. Additionally, the foundation decided to suspend all reporting requirements.

These principles are in line with a joint recommendation from Philanthropic Foundations Canada, Community Foundations Canada, Environment Funders Canada, and The Circle encouraging Canadian philanthropic organizations to move towards a more flexible model of collaboration with grantees. The goal of these adjustments is to contribute to greater financial stability in the sector, while ensuring that local organizations have the freedom and capacity to use funds as effectively as possible.

GIVE5

Give 5 is an initiative set forth by several private and community foundations to increase the amount of funding disbursed by the philanthropic community throughout 2020. Currently, the Canada Revenue Agency requires that foundations allocate at least 3.5% of their total assets to philanthropic initiatives annually. However, given the current crisis and the profound impact of COVID-19 on the charitable sector, the GIVE5 initiative asks foundations to pledge at least 5% of their total assets for disbursement throughout the year. According to the GIVE5 initiative, this is a way for the philanthropic community to follow efforts implemented by government and the business community in responding to urgent needs arising from the current health crisis.

The Lawson Foundation has joined the GIVE5 pledge promising to allocate a minimum of 5% of its total assets in 2020.

Multi-funder Initiatives

The Indigenous Peoples Resilience Fund

The Indigenous Peoples Resilience Fund (IPRF) is an initiative set up by Indigenous knowledge holders in partnership with several non-governmental funders as a tool to support Indigenous communities during the current public health crisis. The IPRF is a natural next step in a process of ongoing dialogue between philanthropic organizations and Indigenous leaders that can be traced back to conversations preceding the development of The Philanthropic Community's Declaration of Action in 2015.

IPRF is a country-wide initiative designed to address Indigenous community needs and contribute to the development of an Indigenous philanthropic infrastructure. Its immediate priorities are related to the current outbreak, but IPRF's strategic priorities stretch beyond the current health crisis in support of long-term Indigenous community resilience. The project has raised CAN\$1.4 million so far and hopes to appeal to other funders as the implementation unfolds.

The IPRF relies on Indigenous leadership to establish funding priorities and procedures. As such, it integrates two parallel conversations:

- a funders' table that serves as a tool for information sharing, collaboration, and learning among foundations supporting the IPRF; and
- an advisory body comprised of Indigenous knowledge holders in charge of directing IPRF funds.

The Lawson foundation is part of the IPRF project and has contributed CAN\$200,000 to the current funding pool.



Analysis and Discussion

The Lawson Foundation's response exemplifies several important trends in how foundations have changed or modified their traditional grantmaking practices to respond to the COVID-19 crisis more effectively. These include:

1. Joining forces with other foundations by taking part in multi-funder initiatives;
2. Relying on local leadership through a more flexible model of collaboration with grantees;
3. Balancing emergency responses with long-term outlook;
4. Employing a learning-oriented approach.

1. Joining Forces: Multi-Funder Initiatives

Like other grant making foundations we have spoken to within the context of this study, the Lawson Foundation has prioritized collaborative grantmaking efforts. Four of the seven initiatives described above are based on some form of collaboration between funders.

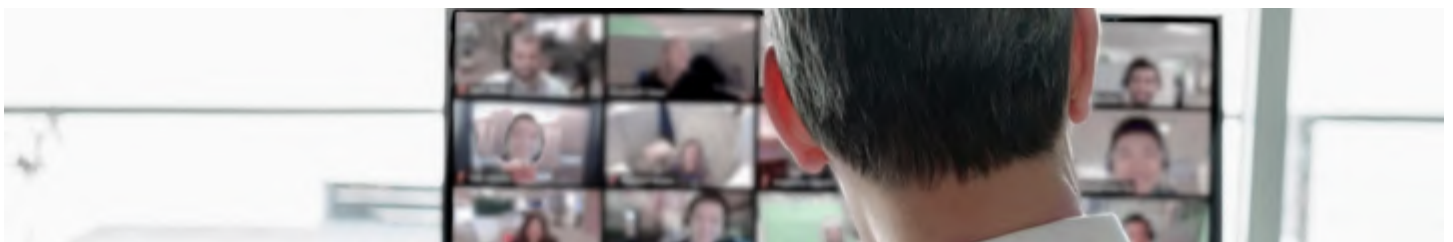
The LCF COVID-19 Response Fund, as well as the IPRF, are examples of new programs developed in response to the pandemic. The first is an initiative between the Lawson Foundation (a private foundation) and the London Community Foundation (a community foundation) as well the Westminster College Foundation, based on a shared strategic interest in supporting the City of London. The latter is a multi-funder initiative, which also involves both private and community foundations.

Another interesting aspect of these two collaborations is that each involves funders that already had experience collaborating with one another. This has allowed funders to make use of previously established relationships, agreements and models of co-operation in setting up new initiatives. Therefore trust, established relationships, and experiences of collaborating with one another seem to be an important factor that has allowed the rapid development of new projects.

Joining forces with other funders brings additional benefits such as the possibility to merge available funding to create more substantial impact. It also achieves economies of scale by reducing infrastructure and operating expenses, thus increasing the amount of funding allocated to grantees.

These initiatives bring opportunities for organizational learning, networking, and collaboration. As our other case studies have shown, multi-funder initiatives have enabled foundations to engage in mutual learning and exchange of information, ensuring that they do not double efforts. It has also enabled cross-sectoral initiatives on large-scale issues that foundations are unable to tackle on their own.

Building on the above, multi-funder initiatives have played an important role in shaping the response of the philanthropic community during the current health crisis. These partnerships have allowed foundations to make more substantial contributions to local communities and emergency issues. Collaborations have also facilitated the swift exchange of information, ensuring that funders complement each other rather than double efforts. They have also presented possible avenues for future collaborations and enabled philanthropic organizations to identify and pursue other opportunities for joint action.



Analysis and Discussion



2. Reliance on Local Leadership: A More Flexible Model of Collaboration with Grantees

The letter to grantees sent by the Lawson foundation is part of a wider effort among foundations to sustain funding levels among grantees. However, in addition to ensuring that payments will continue as planned, the letter also takes an important step by repurposing previously restricted funds as unrestricted funding. This means that funds can be used at the discretion of grantees to support issues created by the outbreak, as well as related organizational expenses, rather than the programs and priorities the funds were previously allocated for.

Application and reporting requirements have also been suspended to ensure that organizational resources can be directed to program operations rather than administrative tasks. This once again reflects a greater level of trust in, and reliance on, community organizations to manage foundational resources based on their own experiences and preferences.

This flexibility is further mirrored in the pop-up teams and the ad-hoc granting program started by the Lawson Foundation. As noted above, the pop-up funds

relied on community-based advisory boards to allocate emergency aid. This meant local leadership was in charge of directing foundation funding, which has allowed greater autonomy within the sector to respond to the current crisis. In the ad-hoc program, funding recommendations are made by staff to ensure support is directed to organization working in the Foundation's broad impact areas. However, there are no granting guidelines and finances are again unrestricted so the organizations receiving the support can decide how to use them.

The same trend of reliance on local advice is present in the IPRF. The agreement reached enabled a fully Indigenous-led process which placed Indigenous knowledge holders in charge of IPRF grantmaking priorities and procedures. A similar practice can be seen in the LCF COVID-19 Response Fund which once again created a local advisory board to direct funds.

While this approach can be seen as a temporary tool to enable a quicker response to the crisis and relieve some administrative burdens related to the management of philanthropic projects, it is important to ask what impact these practices have on aid effectiveness. A collaboration process that allows for greater autonomy of grantees in the allocation and management of foundation funding may be an important tool for empowering the sector. In the process of rethinking how the sector is rebuilt after the pandemic, it is essential to further assess the usefulness of this and other emerging grantmaking models.

Analysis and Discussion

3. Balancing Emergency Responses with Long-Term Outlook

The attempt to balance short-term rapid responses with a more strategic application of emergency funding is present in three of the seven initiatives undertaken by the Lawson Foundation: the pop-up granting teams, the ad hoc support for organizations in broad impact areas and the IPRF. However, these initiatives have approached and addressed this tension in different ways.

Both the pop-up community grant, and the ad hoc support program have taken a phased approach to releasing funds. While initial funding in both programs was disbursed within two to three weeks from the start of the outbreak, both programs will continue until the end of the year. This means funds are being released gradually to balance short term urgency with a longer-term outlook on future needs in the sector. In other words, both the pop-up community funds and

the ad hoc support for partners have used a phased approach to simultaneously ensure a rapid response to the crisis and a more strategic intervention right after.

On the other hand, the IPRF has approached solving this tension differently. Despite pressing concerns, the IPRF decided to postpone its immediate response to the crisis, taking some time to develop long-term decision-making infrastructure, strategic guidelines, and work out grantmaking procedures before dispensing any funding. While this was a rather quick process, it nevertheless delayed the immediate availability of IPRF grants to combat the current health crisis.

Going forward, it would be interesting to see what the strengths and weaknesses of each of these approaches are. This friction between responding to urgent needs and ensuring strategic effectiveness of scarce resources is inevitably connected to philanthropic responses in emergencies. Therefore, the usefulness of both models in addressing the short term and long-term consequences of the COVID-19 crisis warrants further study.



Analysis and Discussion



4. A Learning Oriented Process

Throughout these initiatives, there is a common emphasis on learning and growth, as well as developing and refining best practices.

For example, an important element of the IPRF was the existence of a “funders table.” This functioned as a forum for the exchange of information, ensuring foundations do not duplicate efforts and can join forces on large-scale issues, as well learn from the process of setting up the fund. In this sense it is interesting to note that while some of the donors involved in the IPRF funders table decided not to take part in the fund, they still remained engaged in these conversations. This once again emphasizes the importance of learning from current experiences.

On a similar note, in their letter to grantees the Lawson Foundation allowed for the repurposing of foundational funding, as well as the suspension of application and reporting requirements. However, our interviewee noted that some kind of reports would be requested from grantees later in the year, with a focus on information that can assist with foundational learning from

these changed requirements. This once again underlines the interest of foundations to draw lessons from these new practices and prioritize foundational learning as a key aspect of these emergency interventions.

This emphasis on reporting in pursuit of organizational learning was prioritized within the pop-up community grants as well. Most of the organizations receiving the pop-up funds were not aware they had been awarded funding, and, once again, funding was not connected to any application and reporting requirements. Yet, the foundation plans to contact grantees for small reports later in the year in order to learn from how the process was organized. At the same time, the pop-up teams were intentionally set up in diverse settings in order to provide insight on where such an initiative would prove most effective and needed.

In this sense it would be interesting to see why organizational learning has emerged as a key element in most of the initiatives taken by the Lawson Foundation in response to the COVID-19 emergency. While it is an excellent practice and certainly not new to foundations, the focus on organizational learning might also point to the lack of extant “best practices” in facilitating emergency aid, and the lack of guidance and capacity foundations have in this regard.



Conclusion

There are several interesting aspects to the initiatives undertaken by the Lawson Foundation in response to the COVID-19 outbreak.

First there seems to be a pattern of foundations joining forces to respond to the current outbreak. The exact reasons for this were not explicitly explored during our interview, but there were certain indications of the importance of the swift exchange of information, mutual learning, and development of future partnerships and collaborations. The initiatives undertaken by the Lawson foundation also indicate that these partnerships are usually based on previous collaborations and pre-existing relationships among funders.

Another vital aspect of the projects and steps undertaken by the Lawson Foundation in response to the outbreak is the increased flexibility in their collaboration with grantees. This includes greater reliance on local leadership, at least in the initial steps of responding to the crisis. In this sense it seems that community leaders and local advisory boards have taken a key role in directing foundational funding, which is understandable due to their knowledge of local needs and priorities, as well as the short time frame for disbursing aid.

At the same time, this trend also represents a change in the relationship between foundations and grantees and a changed model of grantmaking. It will be interesting to see how this model develops further once the immediate emergency is over.

The initiatives described here also indicate a tension between rapid responses to urgent needs and a more strategic distribution of scarce resources. It is evident that different initiatives have taken alternate routes to overcome and balance such tensions. It is essential that the usefulness of these different approaches to balancing urgency with long-term effectiveness is further examined in order to provide foundations with tools for addressing such concerns in the future.

Finally, most of the initiatives described above are characterized by a strong learning component. While this is extremely positive, it raises the question: is such an orientation an expression of a lack of tools and best practices that foundations have at their disposal to facilitate grantmaking in emergencies?

Acknowledgements

Earlier versions of this report have benefited from insightful comments and suggestions made by Adam Saifer, UQAM. The report is part of a PhiLab study on COVID-19 responses in Canada's Philanthropic Community led by Jean-Marc Fontan, UQAM and Manuel Litalien, Nipissing University.

Philanthropic Responses to COVID-19: Re-Examining the Role of Grantmaking Foundations in a Changing Society August 2020

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This report provides a summary of a conversation with Andrew Chunilall, CEO of Community Foundations Canada (CFC), around the role of philanthropic organizations in Canada during and after the COVID-19 crisis. The interview was conducted in May 2020 and therefore reflects early impressions of the philanthropic sector's reaction to the outbreak.



Introduction

This interview was initiated with the purpose of exploring a specific collaboration between a private foundation and a community foundation, in order to learn whether such collaborations are becoming prevalent in the wake of COVID-19. However, our conversation quickly showed that collaborations between private and community foundations are only one of many philanthropic sector responses to the current crisis. Therefore, the topic of discussion quickly shifted to broader sector-specific issues that are challenging the traditional role and approach of grantmaking foundations, especially in the face of the ongoing pandemic. These larger debates are particularly relevant in the current climate, as the pandemic has inspired a widespread conversation around what a more sustainable and just future would look like.

The report is organized into two parts. Part one summarizes key insights from our conversation with Andrew Chunilall, CEO of CFC, including the immediate response of philanthropic organizations to the COVID-19 crisis, as well broader constraints that hinder the ability of grantmaking foundations to contribute to the pandemic response.

Part two builds on these ideas to identify three directions for rethinking the approach of philanthropic organizations post COVID-19 crisis:

- Re-examining the role of philanthropic institutions in a changing society;
- Realigning the philanthropic business model with the social functions of philanthropy;
- Immediate and strategic contributions of foundations in rebuilding the third sector.



Philanthropic Responses

1. COVID-19 and Philanthropy: Responses to the Current Crisis

Andrew Chunilall notes several factors that have shaped how grantmaking foundations have responded to the pandemic. These include:

- a greater reliance on grantees including increased flexibility in the implementation of funds;
- a clear focus on ensuring prompt and uninterrupted cash flow and reduced application and reporting requirements;
- increased collaborations to achieve impact and scale.

An example of this flexibility is a joint statement between Philanthropic Foundations Canada, Environment Funders Canada, Community Foundations of Canada, and The Circle on Philanthropy and Aboriginal Peoples in Canada that provides grantmaking foundations with key guiding principles for engaging with new and existing grantees throughout, and beyond, the crisis.

Mr. Chunilall notes that the current crisis has also resulted in increased collaborations, especially among private and community foundations which, despite having similar objectives, did not regularly engage in joint initiatives before the current outbreak. However, the COVID-19 crisis has allowed them to rethink some of these practices and has emphasized the importance of achieving impact and scale. This means that there are currently several projects that bring private and community foundations together.

A good example of the trends mentioned above is the Indigenous Peoples Resilience Fund (IPRF). The IPRF has assembled several community and private foundations to support a fully Indigenous-led initiative, where a grantee's advisory group has full authority to define both the priorities, as well as operating procedures, of a fund. This marks a shift to a model of philanthropy that is grantee-led—where foundations abandon predetermined approaches and objectives and rely on local groups and communities to decide what is best

for them. Such an approach goes beyond simply prioritizing local knowledge to speed up the distribution of funds to local communities; the IPRF is a starting point in building Indigenous philanthropic infrastructure. Another thing that Mr. Chunilall notes is that, in spite of the underlying awareness that many of these changes were needed, they were only made possible as a result of COVID-19:

[The IPRF] is something we would not have contemplated 12 weeks ago, even though it was as wanted, as needed, and as urgent then as it is now. But a pandemic just gives you permission and eases the political pressure within our networks to get things done.

What is common is wanting to do something and seeing that something needs to be done. The challenge lies in power, however, seeing that Indigenous groups would prefer to go to a philanthropic infrastructure that is Indigenous-led and Indigenous-governed to support their own communities... The question is, do we have the responsibility, with our resources and our money to make those infrastructure plays possible, and how do we do that without imposing our own culture and values on another culture. This means that we need to give our money, and social, and political capital to another group of people and say this is now your responsibility... It is a reverse of the colonial thinking, which is we will come in with our money and tell you based on what we have done, how things should be done.



During our conversation, it became clear that private and community foundations have advocated for flexibility and the importance of local leadership in tackling the current crisis. They have moved from insisting on close guidance and oversight over fund disbursement to more flexible and locally guided approaches. They have increased cash flow in the sector, while decreasing application and reporting requirements and, in this way, ensured prompt support for community-led initiatives. As several of our small case-studies point out, foundations have also shown a tendency to combine resources to fund different initiatives. These steps have laid the groundwork for rethinking the dominant model of grantmaking operations and, in the case of IPRF, reconsidering how foundations can make more sustainable contributions to combatting inequality.

All of this considered, we asked our respondent if foundations have risen to the occasion when it comes to handling the current crisis. The answer, he explains, is complicated: *“When it comes to the foundations ability to be adaptive during a pandemic, we have done an OK job, but we need to do better.”*

On the one hand, there has been a prompt response throughout the sector. On the other hand, foundations have prioritized the protection of their assets. And while this approach may be a natural response for profitable businesses, it goes against the basic social function of philanthropic institutions. Mr. Chunilall further warns that the sector’s response needs to be assessed in the context of the crisis we are currently confronting.

The bottom line is that, while the response of foundations has been reasonable and well executed, it has not been sufficient for the scale of the emergency we are currently facing.

That is what the challenge now is for philanthropy, to do something that is extraordinary so that it matches the magnitude of what we are currently facing. We are sitting on billions of dollars and do we mobilize those resources now, even when the restrictions of trust laws are taken away? Culturally as accumulators we cannot do it. This is why I say we have lost ourselves in capitalism, we were supposed to be wealth distributors, we are wealth accumulators now.

It is this core tension between wealth accumulation and wealth distribution that shapes the possibilities and limits of how philanthropy can respond to COVID-19. Philanthropic foundations have done well by repurposing funds, increasing cash flow, and loosening application and reporting requirements. They have placed more power in the hands of grantees to allow for a more effective response to the crisis. But could they have done more?



There is no board in this country that runs a private or community philanthropy that does not write on the dashboard what the total asset is month by month, and if that number goes down for six consecutive quarters of what their average is, there is panic. That's the mentality: we are asset accumulators, we are not redistributors anymore. We were meant to be, but we have lost our way.

- Andrew Chunilall

2. The Role of Philanthropy: Limitations and Underlying Paradoxes

This section explores broader issues that have limited the ability of foundations to devise a more substantial response to the current crisis.

2.1 Underlying Paradoxes: Business Model vs. Social Function

The ability of grantmaking foundations to fulfill their societal function is constrained by the attention they must place on protecting their assets. This rationale is justified by an underlying belief that they must exist to perform philanthropic grantmaking in perpetuity.

Our interviewee further sees the accumulator mindset as an outcome of a fundamental paradox between the societal function of foundations and their predominant “business model”.

In summary, there is a tension between philanthropy’s “business model” that relies on the accumulation of wealth and its social function of wealth distribution. Foundations are meant to address wealth inequality, yet at the same time they rely on accumulating wealth to sustain their own existence which essentially undermines their philanthropic mandate. The impact of this friction, according to Mr. Chunilall, can be seen in the discrepancy between financial and social investment returns.

This tension is present in recent calls to review how foundations use the totality of their assets to achieve social impact, as well as concerns regarding the currently prescribed minimum of 3.5% of total assets that foundations are required to distribute annually. These questions have become mainstreamed through movements such as the Give5 and the #Other95. The first one calls for a review of the above-mentioned disbursement quota, while the latter asks for a more general examination of how foundations can better use

the totality of their assets to achieve social impact. Despite increased public discourse, these conversations have had no tangible outcome as of yet. What concerns our respondent even more is the reluctance of foundations to engage in an open conversation that will explore these paradoxes.

Discussions surrounding novel approaches and models that would ensure foundations provide a greater contribution to society is not new. But these conversations have gained a new sense of urgency in the current crisis. According to our interviewee, it is important to sustain the momentum behind these conversations, as we work to rebuild the sector not to what once was, but rather to what we want it to be.

2.2 Blurred Boundaries and the Changing Roles of the Private and Public Sectors

Another aspect to consider when rethinking grantmaking foundations is how changes in the private and public sectors may affect the role and function of foundations.

Andrew Chunilall spoke about the changing relationship between business and society. As consumers become more informed, attentive, and aware, they expand their purchasing criteria to also include business externalities. The business sector is therefore forced to rethink the concept of business value and ensure that it considers its wider impact on the environment and people in addition to profit. A variety of concepts such as sustainable businesses, triple bottom line accounting, and shared value are used to emphasize a commitment by businesses to provide value not only to the company’s shareholders, but to all relevant stakeholders. As businesses start adopting mechanisms to minimize and address their own externalities, they begin to integrate some elements of the mandate of philanthropic institutions into their frameworks. Mr. Chunilall notes the concept of “stakeholder capitalism” as a recent example of these changes.



2.3 Durability in the Face of an Economic Downturn

The COVID-19 outbreak and the ensuing economic downturn adds an additional layer to conversations around the role of foundations moving forward. The current economic environment impacts foundations' ability to deploy funding, as their financial sustainability is highly dependent on positive financial returns on investments. Our interviewee notes that a recessionary environment will require innovative approaches by foundations to ensure social impact:

As we move forward, an important concern will be philanthropic organizations' capacity to fulfill their role even as their assets start to shrink, especially as we move away from emergency responses to broader sector restructuring. Mr. Chunilall further emphasizes the importance of foundations' responses considering the key role they need to play in reorganizing and reimagining the third sector:

Looking at the sector, we are the capital holders, so how do you move liquidity in the system to ensure stabilization? But implicit in stabilization is actually maintaining the status quo. It is about ensuring that what was before we entered the pandemic will be what we get out to ... that language is now obsolete... We learned that this is the new normal and therefore we cannot be in stabilization anymore because maintenance will not take us where we need to go. We now need to restructure and retool and make investments that are not about status quo and maintenance, and this requires different types of investment.

To summarize, the imminent economic downturn threatens the sustainability of the predominant business model of foundations, as this model relies on positive financial returns as a precondition for the deployment of funds to communities. Sustaining foundations' ability to invest in communities will therefore require a move from the traditional reliance on grant-making to new and innovative models of community support. These questions become even more important when we consider the key role of foundations in guiding the development and restructuring of the third sector in the time to come.

As businesses strive to create value for various interest groups beyond their shareholders, philanthropic institutions must think about how to follow suit. This includes efforts to ensure that their total assets are more effectively used to make a meaningful contribution to their social role and mission.

The changes in the private sector are followed by ongoing modifications in the implementation of various public services as a result of the current outbreak, some of which may remain in place even after the immediate crisis is over. However, there is also an understanding that the pandemic has exposed and exacerbated a multiplicity of issues already present in our society that cannot be fully addressed through these individual policy modifications, and might require a more systemic solution.

Mr. Chunilall finds it plausible that one of the outcomes of the crisis will be a call for re-examining how we address systemic inequalities in Canada, as well as a more comprehensive review of the key pillars of the welfare state. He further spoke of a small group of leaders within the Canadian philanthropic community that have already started these conversations.

For our respondent, the purpose of these conversations is to explore more just and sustainable ways forward and to use this time of rapid change to make long-term solutions that will be the basis for a more equitable and just society.

What is important for philanthropic institutions is to anticipate the incoming changes to the ways the public and private sectors operate, especially considering the rapid adjustments that are happening as result of the pandemic. This will allow them to better adjust the models of operation to new realities and find effective ways to deliver their mandate and perform their social function.

Discussion and Conclusions: Rethinking Philanthropy

This section briefly summarizes some of the key interview findings and identifies three important trends that influence the role of philanthropic institutions going forward:

1. The tension between a foundation's business model and mandate;
2. Changing mandates for public, private, and third-sector organizations;
3. The role of foundations in rebuilding the third sector given their defining role in allocating sector resources.



Trend 1: Tensions Between Model and Mandate

Our interview flags important tensions between the model and social mandate of foundations. For one, it emphasizes the paradox between a business model based on wealth accumulation and a mandate of wealth distribution. As foundations work to protect and grow their assets, do they produce instead of reduce inequality?

Currently, foundations are required to disburse 3.5% of their total assets annually towards their social mission. In return, the totality of their assets and revenue is untaxed while placing no further restriction on how the rest of their assets are used. The question is, can we make sure that the entirety of foundations assets is used more to effectively contribute to their social mandate and achieve social impact?

These issues are further complicated by an imminent economic crisis that will limit the ability of foundations to ensure financial returns that can be distributed to society. This means that in the short-term, foundations are faced with the task of devising innovative and creative operating models to continue to achieve social impact despite limited financial returns. In the long-term, it becomes increasingly important the foundations rethink their dominant operating models and explore new avenues to achieve greater social impact and contribute to their social mission.

Trend 2: New Roles for Philanthropic Institutions in a Changing Society

The COVID-19 pandemic has exposed and further aggravated a multiplicity of issues prevalent within Canadian society, including climate change and environmental injustice, social and economic disparities, and systematic exclusion based on race, gender, and class. The current crisis has also demanded that we abandon some well-established models of conducting life and business and has led to changes in how core social services are organized. For some, it has also been an opportunity to call for a move from partial remedies to rethinking the very organization of our society. Our interview informed us on ongoing conversations within the philanthropic sector around the need for a new social contract, as well as the presence of a small group of individuals in the sector who are already exploring what such a social contract for Canada should entail. This is just one of many such conversations taking place across sectors—from education, to child rearing and healthcare—on how we can use the disruptive capacity of the current crisis to rethink ways forward.

At the same time, the business sector has already been engaged in an intensive process of rethinking how it organizes its contributions to society. By taking steps to revise its mandate and integrate a commitment to bringing value beyond shareholder profit, it affects the distribution of roles between the three sectors. For foundations, this raises questions on their own mandate and the ways in which they create value for their own stakeholders and the communities they serve.

A change in each sector will inevitably trigger a change in the other two sectors. Therefore, it becomes essential for philanthropic institutions to contribute to these conversations as a long-term investment in achieving social, economic, and environmental justice.



Trend 3: The Influence of Foundations in Rebuilding the Third Sector

As foundations control a large portion of the resources underpinning the third sector, they will play an important function in rethinking and restructuring the sector in the time to come. Foundations outline the conditions by which charitable organizations access resources. In this way, they have an essential role in defining a future vision of the sector and the steps required to achieve such a vision.

Examples from philanthropic responses to the current crisis have shown us that foundations are trying to place more power in the hands of their grantees. They allowed and called for greater flexibility in granting procedures, expanded support for organizational needs, and increased the autonomy of community partners in fund allocation. As the outcomes from these changed practices unfold, it is essential that foundations recognize and build on the empowerment and learning that comes as result.

Conclusion

The purpose of this analysis is to provide a starting point for some of the conversations that will take place as we navigate the philanthropic sector post-COVID 19. It warns against sliding back to the already established ways of conducting life and work, and using this opportunity to engage in conversations about shifting the roles and approaches of philanthropic institutions to ensure their mission and mandate is met more effectively, especially considering the ongoing changes in the business and public sectors.

The crisis has provided an opportunity to test new models of collaboration with grantees, reinvigorated debate regarding how foundations work with the totality of their assets and demanded innovative approaches to sustain philanthropic investments despite an economic downturn. The implications of these changes need to be considered as we develop a vision and roadmap for rebuilding the sector post-COVID-19.



Acknowledgements

Earlier versions of this report have benefited from insightful comments and suggestions made by Adam Saifer, UQAM. The report is part of a PhiLab study on COVID-19 responses in Canada's Philanthropic Community led by Jean-Marc Fontan, UQAM and Manuel Litalien, Nipissing University.



South Saskatchewan Community Foundation: Response to COVID-19

January 2021

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PhiLab

This report is part of a series of case studies exploring the effects of the COVID-19 pandemic on Canada's philanthropic community, as well as the adaptive capacity of Canadian foundations in response to the current crisis. Our goal is to capture some of the novel initiatives developed, and/or supported, by Canadian foundations in response to the outbreak. We also aim to provide some sense of the impact these initiatives might have on the public, as well as the philanthropic community, both amidst, and after, the COVID-19 pandemic. The data from our analysis complements the findings of a systematic survey undertaken by Philanthropic Foundations Canada (PFC), as well as a Delphi method-based examination of the perspectives of experts in the field.

Introduction

The current report outlines how the South Saskatchewan Community Foundation (SSCF) has responded to the COVID-19 outbreak. It is based on a conversation with Donna Ziegler, the foundation's Executive Director, about specific actions taken by the SSCF. We use the conversation as a starting point to identify other relevant philanthropic initiatives developed by additional philanthropic organizations in response to the COVID-19 pandemic.

Our conversation identified several initiatives undertaken by the SSCF. Some of these initiatives were developed and implemented by the SSCF exclusively, while others were collaborative projects with other organizations that the SSCF launched or adapted in response to the outbreak.

The report is organized into two sections: (1) SSCF's response to the COVID-19 pandemic; and (2) future directions for the SSCF. The first section focuses on changes in grantmaking practice, operations, and collaborations. The second section describes long-term changes in grantmaking policy, programming and initiatives, and the day-to-day operations of the SSCF.



1. Response to COVID-19 by the SSCF

About SSCF

The South Saskatchewan Community Foundation (SSCF) connects donors and charities by facilitating the distribution of donations to charities and non-profit organizations located in Regina and in Southern Saskatchewan. In comparison with other Canadian foundations, the SSCF oversees the largest geographical community in Canada, covering approximately 472,000 people and 481 communities. The SSCF states that their mission is to build a “strong, inclusive, and fair place to live, work, and play” by investing in the community. They achieve this by working with donors, distributing donations, researching community needs, and investing pooled philanthropic and organizational funds for a higher return. Since the beginning of the pandemic, the SSCF has been successful in distributing almost \$10 million back to nearly 500 charitable organizations across their vast geographical area.

The SSCF was established in 1969 and is a member of Community Foundations of Canada (CFC) – a national membership organization with over 191 community foundations across Canada. In 1969, the SSCF

had an asset base of \$60,000; currently, it has an asset base of close to \$80 million made up of a variety of fund types including: donor-advised, agency, and designated funds, as well as more traditional philanthropic assets to be distributed through competitive granting processes, and their own discretionary grant: Smart and Caring. These funds include endowed and nonendowed funds, community building funds, business funds, and individual funds. The SSCF board is comprised of 12 board members who oversee the governance structure and the policies of the organization. There are 7 full-time staff members that control the SSCF's day-to-day operations, and one consultant that aids in communication between the foundation, donors, and grantees.

The SSCF's membership includes a group of 45-50 charities that regularly take part in the Vital Signs community network: a network of communities that works to assist SSCF with local research and information on immediate community needs. Vital Signs provides the SSCF with information regarding the health of the community, the needs of charities, and how communities and charities can collaborate with one another in order to provide solutions for one another.

1. Response to COVID-19 by the SSCF

Initial Response to the COVID-19 Pandemic

The SSCF anticipated that the COVID-19 pandemic would have enduring consequences on marginalized communities that experience poverty, and mental health crises. They understood that the communities that would suffer most would include:

- those living in poverty, who may not be able to ‘stock up’ on supplies, nor find a safe place to isolate;
- those with mental health challenges, who may be uniquely impacted by COVID-19’s impact on daily life, including the disruption of key in-person social services;
- those marginalized by race, gender, or other axes of identity;
- those experiencing domestic violence.

Following the World Health Organization’s declaration of COVID-19 as a global pandemic, Saskatchewan went into lockdown on March 16th of 2020. The government of Saskatchewan told the public that there would be four stages to their response to the pandemic, each with a different focus or strategy, in order to return to ‘life-as-normal’. In the first phase of the re-opening process, there were only a few cases of COVID-19 in Saskatchewan; however, the SSCF recognized the urgency for immediate support to nonprofit organizations and charities across the province. As demand for charitable services grew, it became increasingly challenging for charities to fundraise in order to meet that demand. The support given to these charities by the SSCF was largely focused on food security, shelters, necessities for children, and necessities for marginalized individuals. The SSCF was in contact with other community foundations across Canada and the Vital Signs Community Network to understand the impacts of COVID-19 on communities in their respective geographic locations.

Financial Aid for the SSCF

In an immediate response to COVID-19, the SSCF put out a call to past and present donors—using both email and phone call correspondence—to ask for financial support. To accommodate the new needs of communities, donors were asked if they would demonstrate flexibility and allow charities to direct existing earmarked grants towards immediate needs (e.g., towards operations and supplies, computers and technology for remote upkeep, and staff employment), rather than directing funds towards programs that do not address the immediate needs of the community (e.g., ‘in-person’ programs that were no longer possible). The Board of Directors of SSCF met on March 12th and recommended a ‘matching’ program for donations up to \$500,000 total in order to support an Emergency Response Fund for Community Need. SSCF staff members contacted friends and donors of the SSCF to solicit financial support and the matching grant was achieved within four weeks through the generosity of the Saskatchewan people and of both new, and old, SSCF donors. The Emergency Response fund totalled \$1.1 million, and went back into the community approximately 8 weeks after the establishment of the matching grant. The federal government provided an additional \$900,000 in June to the SSCF. These funds were directed back into the community with the help of Community Foundations of Canada. The federal government provided an additional \$333,000 in a second round of federal funding that was distributed back into communities. While not through the SSCF, the provincial government offered some support to about four shelters in the amount of \$178,000. However, while this effort was welcomed, it was not enough to meet the huge influx of grant applications from community organizations.

1. Response to COVID-19 by the SSCF

SSCF Donor Response

The SSCF is in communication with various donors who provide financial support to charities and non-profit organizations of their choosing through donor advised funds. In addition to matching the \$500,000 grant provided by the Board to SSCF's Emergency Response Fund, donors were also asked to be flexible in their grantmaking, offering extensions to grantees unable to use the funds for specific projects. These extensions allowed grantees to put their funding on hold until they could use it, or redirect it towards operational costs. Some donors changed grant application criteria to include COVID-19 challenges. This allowed grantees affected by COVID-19 to put the money towards operational supplies or other immediate needs. Through community data gathered by the Vital Signs Community, as well as the information provided by a local shelter and food organizing group run by the City of Regina, the SSCF was well-informed regarding emergent needs and was successful in helping donors understand these needs and where funds would be most helpful. Overall, donors were very appreciative of the information and agreed with the adaptations. The donors were proud to help and appreciated regular communication in regards to where change was required. The money given by donors was, and continues to be, put primarily towards social or health programs, aligning with COVID-19 relief needs.

Operational Changes & Commitments

The daily functioning of the SSCF was impacted by the pandemic. Staff and donors were forced to adapt to the new restrictions and guidelines put out by both the federal and provincial government. This meant that staff were required to work from home in a virtual setting. To help transition to these new working conditions, the SSCF provided staff with: home equipment, money for cell phone use, extra time off when needed to avoid burnout, and nominal reimbursement for printing and/or incidentals required. Upon receiving the initial \$900,000 from the federal government, the SSCF hired a local grantmaking consultant to aid in the transfer of funds from the CFC to aid in the transfer of funds to communities.

In order to accommodate the increase in applications alongside the increase in grant funds, certain policies needed to be amended. For example, the SSCF's Executive Director was granted the ability to approve funding requests to the Community Response Fund, the Emergent Need Fund, and the Investment Readiness Program, as well as grant requests up to \$50,000—double the previous limit of \$25,000. The criteria for grants were also revised in collaboration with other organizations (e.g., the Red Cross and the United Way) so as to prevent charities from applying to each or-

ganization for the same funding, thereby preventing 'double dipping' for the same funds. Administrative policies shifted as well. For example, written cheques were replaced by electronic fund transfers that could be approved via digital consent from the board twice a week. SSCF's mailing address was changed to the Executive Director's home address at the beginning of the pandemic, though this was later changed to a separate Post Office Box number. Board committee work was put on hold for approximately six weeks to ensure necessary COVID-19 practices were being carried out, and regular updates were provided to the board bi-weekly.

Board members reached out to their networks to try and find individuals who would be interested in supporting the fund, and double their impact through the matching \$500,000 grant. In response to the donors' efforts, the SSCF quickly put out ads in the newspaper, sent emails, and made phone calls to thank the donors for their generosity. Board members were enthusiastic about attending educational seminars that would provide information on helping staff members through the pandemic, as well as the responsibilities of the board through the pandemic. Additional support was offered in the form of sessions on how to deal with COVID-19. These were created in collaboration with the University of Regina Community Engagement and Research Centre. The SSCF also increased flexibility around staff work times, accommodating their needs at home and at work.

1. Response to COVID-19 by the SSCF

Collaborative Efforts

During the pandemic, collaborations have been extremely important for offering support to communities, as well as keeping philanthropic donors informed of what supports are being offered. The SSCF is a collaborative foundation that reaches out to other foundations to ask questions and gain insights. It makes use of the network of foundations that communicate with one another (CFC), sharing information about governance and policy, allowing for growth and improvement in the way each foundation conducts business.

In the face of the pandemic, the SSCF has used this network many times and has been in contact with the city of Regina, CFC, the Red Cross, the United Way, the Community Initiatives Fund, the Saskatchewan Non-Profits Association, and numerous charities that serve the needs of marginalized communities. The United Way uses a 211-phone number in Saskatchewan that acts as a 24/7 service to connect individuals with human services in the area. From these calls, the United Way can understand who is calling and what their needs are, and share this information with the city of Regina and others organizations like the SSCF. If a charitable request does not fit the SSCF criteria for funding, that person or organization can be referred to one of the collaborating foundations (e.g., the United Way, the Red Cross).



2. Future Directions for SSCF

Funding for Charitable Organizations by the SSCF

When discussing the second phase of the re-opening process (~June 16th) with the Executive Director of the SSCF, the focus shifted towards rebuilding; namely, understanding the permanence of the pandemic in the years to come, and what this means for the delivery of services by charitable organizations. By the fall of 2020, many charitable organizations recognized the need to re-evaluate their operations by reducing staff sizes, cutting work hours, and moving away from an ‘open office’ setting that prioritizes face-to-face communication and collaborations with one another. This is not possible, however, for front line charities such as the Young Women’s Christian Association (YWCA) shelter, Regina Transition House, Carmichael Outreach Regina and North Central Family Services

because the individuals seeking their services do not have anywhere else to go. As a result, their doors have had to remain open to accept people into their shelters with the appropriate COVID-19 precautions. These services were able to apply for funding through the SSCF, which allowed them to change the way they deliver services including, for example, delivering food baskets and delivering essential services to seniors in the community.

Long-term care facilities received funding from the SSCF which allowed for virtual communication between residents and their family members, and paid for additional security to prevent visitors from coming and going from the complex, thereby mitigating the risk for the spread of COVID-19 to the residents. They also provided 25 Chrome computers to a First Nation reserve, Cowessess, which gave grade 11 and 12 students an opportunity to continue their education, and communicate and collaborate with members of their community.

Permanent Initiatives

The SSCF hopes to remain flexible in their delivery of services and in their daily operations, and maintains that all internal online administration procedures will endure beyond COVID-19. For example, their software database system allows staff to work from home and deliver services. However, they have made plans to keep a ‘blended approach’; that is, some walk-in opportunities will open with reduced staff and hours. Distance working and electronic relations are expected to continue. The SSCF has also provided financial support for a virtual counselling service software that will enable long-term support beyond COVID-19. They remark that “[...] some investment in technology will outlive the COVID immediate requirement and help deliver services differently in the future” (Executive Director of SSCF).

2. Future Directions for SSCF

Relational Changes

Established collaborations with other foundations and with Vital Signs are expected to remain in place in order to continue generating insights on where and who needs funding. The SSCF will continue to contact donors if there are pressing needs within a particular population or charity. Donors have also demonstrated flexibility and confidence in terms of the charities they have supported during the pandemic and are sensitive to new target populations affected by COVID-19. Donors recognize that charities do not run solely on volunteers; rather, there are operational expenses that require funding in order for charitable organizations to offer support to those that are not protected by government funding. In addition, the COVID-19 pandemic has led to a realization that fundraising for charities must be adaptable. Fundraising opportunities for charities will not always be available in terms of operational dollars that allow for the continued distribution of services. Thus, new ways of supporting charities must be uncovered to provide support to those organizations during a crisis. This is especially true for those charities that are dependent on a physical showing of support such as the arts, museums, and sporting events. During the pandemic, it has become clear that these charities play an important role in maintaining the mental health of the members of their community.



Conclusions

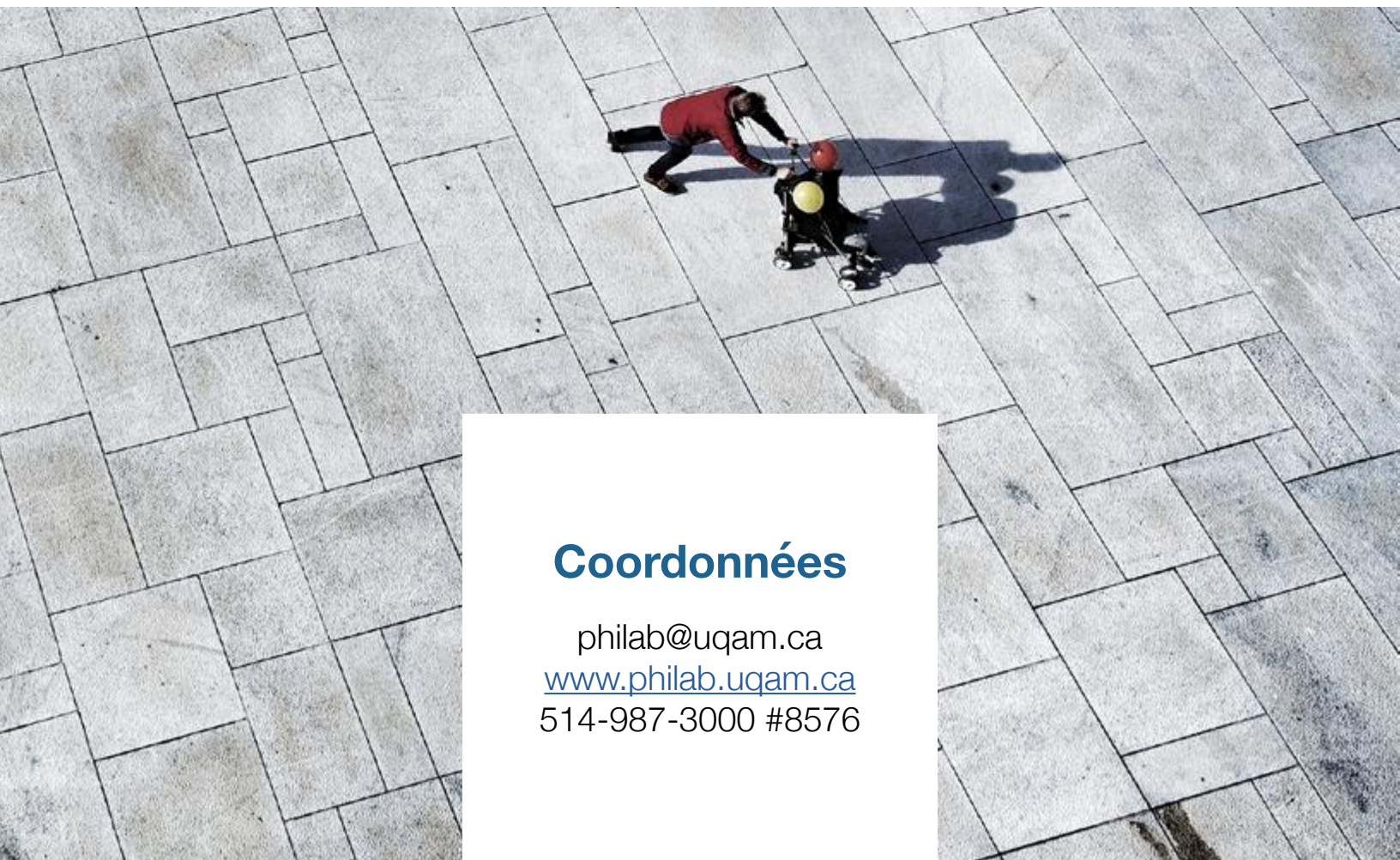
The SSCF recognizes that marginalized populations are most affected by COVID-19 and has made the appropriate adjustments to their foundation policy and practice in order to address this reality. The donors that help to supply grant money have demonstrated flexibility to meet the needs of communities during the pandemic and remain in constant contact with members of the SSCF. Operations at SSCF have changed to follow health guidelines and are expected to remain stable for the foreseeable future. Staff members have increased flexibility and are able to work remotely as well as offer in-office services with reductions in staffing and hours. Collaborative efforts to understand target populations are expected to remain stable in order to collect information on community vitality and needs. Despite the efforts of foundations and donors, community needs are much greater than philanthropy's ability to distribute funds. The SSCF will continue to document which communities lack the funding they require, and will reach out to donors that may be interested in providing financial support to those in need.

The SSCF's response to the COVID-19 pandemic reflects many of the strategies, policies, and practices implemented by grantmaking foundations throughout Canada. What is particularly noteworthy about the SSCF case, however, is how their well-established relationship with the Vital Signs Network allowed for a rapid and well-informed response to grantee and community needs. While this pre-existing open line of communication and dialogue between funders, grantees, and communities certainly facilitated the sharing of important grassroots knowledge for a speedy and informed COVID-19 response, it can also serve as a model for a more responsive, democratic, and collaborative philanthropic sector post-COVID.



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