



PHILANTHROPIC
FOUNDATIONS
IN CANADA

LANDSCAPES,
INDIGENOUS
PERSPECTIVES
AND PATHWAYS
TO CHANGE

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

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Part three
Chapter ten



Community foundations at work: Mobilizing and connecting place-based philanthropy

Laurel Carlton and Sara Lyons





Philanthropic organizations are called to the table around a range of complex issues, such as reconciliation and restoration, the future of community journalism, and the Sustainable Development Goals (SDGs), which require action on root causes including poverty, racism and inequality. In recent years, philanthropy has stepped far outside its traditional grantmaking role into new areas like social innovation, social finance, collective impact, public policy work and systems change. Across many sectors, interorganizational collaboration, partnerships, and network-building have been recognized as fundamental to innovation and achieving impact when working in complex areas (e.g. Wei-Skillern & Marciano, 2008; Pearson, 2010; Pole, 2016; Glass and Pole, 2017).

With an eye to deepening the impact of its work, Community Foundations of Canada (CFC) has expanded its partnership practice over the past decade, working with Canada's 191 community foundations and a mix of federal and provincial governments, private sector organizations, and philanthropic partners. These partnerships have spanned a range of areas, including impact investing, community knowledge, food security, and the development of community philanthropy in Canada. As CFC has worked across sectors, two specific initiatives from the last four years stand out for their unique design, scale, and volume of learning and insight about the potential for mobilizing community philanthropy towards a common vision and in partnership with others: the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th.

Both of these initiatives have offered important insights about the unique ways that place-based philanthropic organizations can mobilize towards outcomes that extend beyond their immediate geographies, with national or even global impact. In the context of a global movement of community philanthropy that continues to grow rapidly – 68% of the world's 1866 community foundations were created in the past 25 years (Community Foundation Atlas, n.d.) – the lessons learned by CFC point towards future opportunities for community foundations

to align their efforts towards impact. Indeed, with increasing attention being paid to the SDGs as well as specific areas including gender (in)equality, demographic shifts, and the opportunities for alternative approaches to capital and finance, there is potential for a rapid scaling-up of partnerships and initiatives towards these shared agendas and global goals.

Following a brief overview of the existing literature that covers collaborations between philanthropic organizations, this chapter will examine the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th, as two case studies that demonstrate the potential of mobilizing place-based philanthropy towards national or global impact. We will briefly explore these initiatives as they relate to the conventional understandings of philanthropic collaborations, and will then explore core themes that emerged through the experience with the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th related to navigating partnerships, accountability, and power dynamics.

Interorganizational collaboration: The literature

Collaboration between organizations and across sectors has been recognized as a key component of effective efforts towards tackling complex challenges (Lawrence *et al.*, 2002; Woodland & Hutton, 2012; Marek *et al.*, 2014; Fine *et al.*, 2018). In her extensive literature review of funder collaboratives, Pole (2016, p. 2) identifies that “collaboration is often seen as the only way to achieve ambitious change goals, based on the recognition that multiple actors need to work together to solve complex problems”. Indeed, “collaboration” between funders has also become a long-discussed topic, with books, conferences, articles, journals and panel discussions dedicated to exploring the opportunities, drivers, wise practices and pitfalls that they present. Some (Pearson, 2010, Pole, 2016, p. 2) note that the proliferation of thinking and support for collaboration has become somewhat of a “buzzword” in sector literature.

A number of authors have focused on collaboration between philanthropic organizations, seeking to identify the drivers and benefits. Primary motivators of funder collaborations include economic necessity, generational shifts among donors as well as their changing expectations, and growing diversity in the sector identifying collaboration as a key to impact (Gibson, 2009, Pearson, 2010). Others have identified the ability for parties to increase their impact, influence, efficiency and organizational learning as driving forces behind collaborative efforts (Prager, 2011, Glass & Pole, 2017). Greater innovation and impact can also be unlocked through interorganizational collaboration and shared learning (Huang & Seldon, 2015).

Others have noted the challenges that face organizations that wish to collaborate, which include an inability to relinquish control, a desire for credit, institutional shifts like staff turnover, and interpersonal tensions (Gibson, 2009). Collaborative efforts can also be more costly than “going it alone”, in terms of time, staff effort and organizational resources (Gibson, 2009; Prager, 2011). When organizations enter into deep forms of collaboration, they are required to adapt their own systems, operational procedures, cultures, institutional norms, and even accountability structures – all of which can be significant impediments to successful interorganizational working relationships (Gibson, 2009; Kabel, 2016; Pfitzer & Stamp, 2010).

A number of authors have divided collaborative efforts into various taxonomies (e.g. Glass & Pole, 2017; Huang & Seldon, 2015; Prager, 2011). In their literature review on funder collaboratives, Glass and Pole note that they fall into two major groupings: “‘light-touch’ collaboration types where participants generally retain their full autonomy over strategies and granting procedures [and] deeper, more integrated forms of collaboration requiring partners to establish joint objectives and ways of working” (2017, pp. 66–7).

Less attention has been paid to either the potential for collaboration between place-based philanthropic organizations like community foundations, or their mobilization towards shared goals – largely on the assumption that their place-based focus meant that these organizations work with others within their own geographies, but not beyond them. Within the literature on place-based foundations and collaboration, attention tends to focus on these foundations’ relationships with businesses or organizations located in one place, or with other funders that are interested in specific, local goals, including United Ways and Tides Canada (Glass & Pole, 2018). In her review of the literature, Pole (2016) suggests that “impediments to collaboration can be amplified” for place-based funders because of a sense of local competition for donors and for a perceived sense of local leadership (Paarlberg & Meinhold, 2012; Graddy & Morgan, 2006; Bernholz, *et al.*, 2005). Ostrower (2007, p. 524) also notes that in their commitment to serving a wide range of interests and needs in a specific geographic area, community foundations’ abilities to partner meaningfully is undermined by their “definition of effectiveness that leads them to try to be all things to all people”.

Those who have considered working relationships between community foundations have focused on efforts to strengthen organizational capacity or the business model itself, whether through alliances, affiliations, or mergers (Elliott, 2009; Graves & Marston, 2011) as well as knowledge-exchange and learning opportunities between community foundations. There are a few examples where community foundations have mobilized their assets by building direct relationships with other community foundations in order to pool funds in response to a common goal, as in the case of Canadian community foundations around the 2013 flooding in Southern Alberta and the 2016 fires in Wood Buffalo (CFC, 2017).

The case studies that follow build on these examples by exploring much larger-scale mobilizations of a network of community foundations around two specific national efforts: the settlement of refugees, in the case of the Welcome Fund for Syrian Refugees, and support given to community-led initiatives connected to inclusion, belonging, and reconciliation in the case of the Community Fund for Canada's 150th. With the rapid growth in community philanthropy and the wide range of complex issues that philanthropic organizations are asked to tackle, these two case studies offer insights into different ways that place-based philanthropic organizations and cross-sector partners can be rallied around a shared vision or outcome for future national or global efforts for impact.

It is important to acknowledge from the outset that the Canadian community foundation network stands out on the global stage for its cohesion as a “movement” and for the fact that CFC is a network organization that is uniquely dedicated to community foundations, rather than being an “omnibus association” that serves all philanthropy (Phillips *et al.*, 2016, p. 70). In both case studies described here, CFC played a central role by promoting a shared vision, managing relationships with partners, designing the initiatives, and coordinating implementation at the national level, while the community foundations themselves led and coordinated these efforts at the community level. Most jurisdictions do not currently have a coordinating body that is positioned to lead in this way, nor such strong partnership-based relationships between individual community foundations and a network organization. CFC is grateful for the opportunity to lead in this way, and recognizes the vital leadership role that community foundations and partners played in each of these efforts, all of which made these initiatives and this subsequent analysis possible.

Case study I: The Welcome Fund for Syrian Refugees

Philanthropy has received ample attention for its slow and intentional pace (e.g. Zinmeister, 2016). That said, philanthropic organizations can also respond rapidly to emergent and developing situations, such as a humanitarian crisis and natural disasters. Such a moment arrived for Canada's community foundation movement at the end of 2015. Following the November 2015 federal election, Canadians broadly united around a campaign promise by the newly elected Liberal government to welcome 25,000 refugees from Syria to Canada. The newly appointed Minister of Immigration, Refugees and Citizenship, John McCallum, issued a call to corporate Canada to contribute to the effort, alongside government and individual Canadians. Shortly thereafter, seed funding from first-mover Manulife was augmented by an historic \$5 million donation from CN, as well as generous support from GM,¹ and a number of anonymous contributors – bringing the full pooled fund to \$6 million.

CFC took up the role as focal point for these donations at the invitation of government and in response to engagement from corporate sector partners. As a result, CFC created the Welcome

¹ Manulife (Manufacturers Life Insurance Company); CN (Canadian National); and GM (General Motors).

Fund for Syrian Refugees to deliver these resources to local organizations that were working directly with arriving families. By working in regular dialogue with the corporate partners and the federal government, CFC used its capacities and networks to scope and understand the challenge, to identify the most urgent and impactful funding opportunities, and to direct appropriate proportions of the pooled fund to the identified organizations and programs. In delivering the Welcome Fund for Syrian Refugees, CFC entered into relationships with large corporate donors, with the government of Canada, community foundations and local agencies.

The Welcome Fund for Syrian Refugees worked in partnership with community foundations in a number of ways. First, many community foundations added to the momentum by raising and/or contributing additional dollars beyond the initial corporate donations, roughly \$2 million in total. This money flowed directly from community foundations to local agencies rather than through the pooled Welcome Fund for Syrian Refugees that was held at CFC. Second, local community foundations played a key role in helping CFC disperse the funds in a way that complemented the central settlement effort driven by the federal government. By contributing local knowledge and contextual perspectives on real actors, needs and developments in communities that were receiving significant numbers of refugees, the community foundations were able to identify meaningful opportunities for impact in a very compressed timeline (CFC, 2016).

By engaging community foundations as partners, CFC tapped into existing relationships with settlement agencies, local leaders and emerging coalitions to support new arrivals. At the national level, decisions about which cities and communities would receive funding were driven primarily by the number of refugees arriving in a community and, in a more minor way, by the ease with which settlement processes were unfolding locally. Local decisions about the destination of funds and their use was determined by a series of “coalitions” comprised of local agencies, community foundations (with a few exceptions) and CFC, each operating from a different set of insights, parameters and desires.

In this work, CFC drew on a long history of movement-building. While CFC held the ultimate responsibility and accountability for decisions and outcomes, it was the significant level of trust between community foundations and CFC that made the pan-Canadian/local dialectic work. CFC emphasized and respected the relationships and leadership roles that community foundations had locally. Further, CFC counted on community foundations to define for themselves the role they wanted and could play, roles that ranged from making an introduction to leading local consultation and fundraising tables. Most importantly, CFC and community foundations relied on each other to do the work of understanding local needs and funding opportunities with skill, integrity, urgency and care. The dynamic of trust that characterized these partnerships was not formally documented but was perhaps the most important element of delivering impact and honouring the purpose and reputation of the community foundation movement.

Ultimately, \$6 million was given to organizations working in 27 communities in proportion to the number of government-sponsored refugees arriving from Syria. Contributions were made in every province and were used for rent subsidies for families, emergency loan funds, urgent mental health care, start-up kits of household goods, language and employment training, and much more. For example, in Calgary, AB, more than 100 families (600 individuals) in financial distress were screened, and a rent subsidy was provided directly to them based on the gap between their monthly budget and their housing costs. In St John's, NL, an Emergency Housing Fund was established to provide refugees with an interest-free short-term loan (or non-repayable grant in certain circumstances) to assist those who were experiencing difficulties in meeting essential living expenses. In Abbotsford, BC, funds were used to cover moving and start-up living costs (moving trucks, damage deposits, key household and gardening supplies) for 22 families, ultimately reducing stress and improving their quality-of-life.

As the flow of refugees ramped up in early 2016, bottlenecks were caused by a lack of affordable rental housing options, particularly in large cities like Toronto, ON, and Vancouver, BC. The federal government brought forward the idea to use the Welcome Fund for Syrian Refugees to top-up the monthly income of families. With more income, families were able to afford the rental units available in their local market and were able to focus on next steps in their settlement journey, including language training, education, employment, attending to medical needs, etc. Ultimately, about 70% of the Welcome Fund for Syrian Refugees resources were used in this way.

As a case study, one of the most interesting elements of the Welcome Fund for Syrian Refugees is that it was created and entirely operationalized in a very short timeframe: five months. Doing so involved a variety of relationships and multiple sectors, all reacting in real time to real-world developments. These ingredients pushed everyone involved into nimble and iterative frameworks and relationships.

Case study 2: The Community Fund for Canada's 150th

While the Welcome Fund for Syrian Refugees demonstrated responsive action to a rapidly developing and unforeseen need, the Community Fund for Canada's 150th emerged following years of intentional engagement with Canadians from coast to coast to coast, as well as relationship-building with civil society organizations and government developments.

In 2013, CFC partnered with CBC/Radio-Canada and Via Rail on CANADA 150/2017 STARTS NOW, a series of local, regional and national conversations intended to “start a conversation with Canadians in all corners of the country, and to use these conversations as a catalyst for action to connect and engage Canadians in 2017 and the 150th anniversary of Confederation” (CBC *et al.*, n.d.). In 2015, these conversations were extended by the creation of the Alliance 150, a network of individuals and organizations from all sectors that shared a desire to mobilize around Canada 150 (CFC, 2015). Through these dialogues, Canadians expressed a desire for 2017 to be a moment

that was more than a celebration. Participants recognized that the sesquicentennial could offer a focusing moment to engage Canadians in dialogue about the past and future of Canada, and to inspire action on pressing issues and community priorities (CFC, 2015; CBC *et al.*, n.d.).

Based on these dialogues, CFC issued an invitation to the government of Canada in early 2015, inviting the federal government's collaboration with community foundations in all parts of Canada to create a locally driven fund that would support issues that mattered most to Canadians. Over the months that followed, CFC worked with the Department of Canadian Heritage to identify the following shared values: an openness to collaboration, a commitment to the inclusion of many voices, and a desire to empower Canadians to shape the local narratives and impact of Canada's 150th.

Ultimately, the government of Canada seeded the Community Fund for Canada's 150th, which was matched by community foundations and made available to Canadians in all parts of Canada. Community foundations issued grants of up to \$15,000 to a wide range of local projects that fitted within three pillars: encouraging participation in community activities and events to mark the anniversary, inspiring a deeper understanding about the people and places that shape communities and Canada, and building community with the broadest possible engagement of citizens. The Fund had a specific focus on supporting projects led by youth, Indigenous peoples, groups that reflect Canada's cultural diversity, and official language minorities (francophones outside Quebec and anglophones in Quebec). Its intended outcomes were around inclusion, belonging and reconciliation (CFC, n.d.).

In order to participate, community foundations were required to match the contributions from the government of Canada. As a result, the Fund was a collaborative investment: every grant comprised both federal dollars and funds from the local community. CFC invited the participation of municipal governments in areas without an active community foundation.

As with the Welcome Fund for Syrian Refugees, CFC held ultimate accountability for the funds from the federal government. The Fund was held centrally at CFC, and, to the extent possible, it was designed around a core principle of upholding the priorities and leadership of Canadians at community level. Funding decisions on the contribution from the federal government were made by the boards of directors of individual community foundations, and the staff team at CFC were actively engaged to ensure that funding decisions were in line with the terms of the partnership with the federal government.

Under the principle of local leadership, each foundation had the freedom to set priorities for the fund in their own community. As a result, the Fund took on a unique local flavour across the country. In some communities – particularly in rural areas – the Fund focused on local celebratory events for the 150th, while in many others the community foundation identified priority areas and invited community members to use the occasion of the 150th as a call to action in regard to those

priorities. For example, in St John, NB, the community foundation focused the Fund on youth-led initiatives; in Montreal, QC, the Fund prioritized initiatives that addressed education, domestic violence and food security; and in Clayoquot Sound, BC, and Peterborough, ON, an emphasis was put on initiatives that built relationships between Canadians of diverse cultural backgrounds, including Indigenous and non-Indigenous peoples.

Notably, because the Community Fund for Canada's 150th was seeded by public dollars, a high level of operational rigidity was required to create national coherence, reporting and accountability. For example, each community foundation was required to use the same core messaging associated with the Fund, and to follow the timelines set by CFC to operationalize the grantmaking process. Further, each one of the 176 participating community foundations was required to conduct the call for grant applications through one shared application portal, which it had access to for the purpose of reviewing applications, and which was ultimately administered centrally by CFC. As described in the literature, this meant that participating community foundations had to give up some autonomy and control over operations in order to access the opportunity to leverage matched funding and amplify their work through the national Community Fund for Canada's 150th.

In total, the Fund supported 2,124 projects in over 630 communities in every province and territory. A total of \$16 million was granted, of which half came from the government of Canada, and the other half came from community foundations, municipalities, and other local partners. As eligible projects were also required to demonstrate that they had other contributions in cash or in kind, these funds were further leveraged – \$20 million in cash from municipal and provincial governments, private contributions, businesses and individuals, and \$24.4 million worth of in-kind contributions of volunteer hours and other donations.

Projects reported that they engaged more than 20 million Canadians, including over 110,000 volunteers, and that they had left a lasting legacy in many Canadian communities. Many of the supported projects created new relationships between Canadians – for example, the gathering of Atlantic francophone families held in Cap-Egmont, PEI, and the summer camp that used sport to build bridges between Indigenous youth and police in Corner Brook, NL. Other initiatives increased connections between Canadians of different cultural backgrounds, as in the case of a series of multicultural dinners hosted in Montreal, QC, and a two-week hide-tanning camp in Yellowknife, NT. Some projects, such as one that connected isolated seniors in rural Nova Scotia, continued to grow resilience in their communities, while others left physical legacies, such as a playground made more accessible in Nanaimo, BC; outdoor learning spaces in Warman, SK, and Shoal Lake, MB; community gardens in Calgary, AB; and a coastal clean-up near Fredericton, NB.

Uptake of the Community Fund for Canada's 150th was not always smooth. In many communities, Canadians were hesitant to engage in a national conversation at all, and expressed a sense of disconnect or isolation from Canada as a country. In these cases, there was more enthusiasm for

Canada 150 and its goals once CFC was clear that interested applicants could interpret the 150th as a moment for community-level impact, one that was reflective of local leadership, decision-making and priorities. This seemingly reflected that Canadians identified more closely with their local communities than with Canada overall.

Beyond the funded individual projects and the thematic challenges, the Community Fund for Canada's 150th demonstrated the potential for mobilizing community-based leadership around a national narrative or goal. In delivering the Fund, community foundations, municipalities, and other local leaders worked towards a shared vision in an unprecedented way, and this experience has left civil society with new capacity for grappling with complex issues in a manner that is both nationally connected and uniquely local.

Scaling place-based connections

Through both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th, CFC explored new ground in terms of unique ways that community foundations can be mobilized to combine and scale local leadership with a national vision, while working alongside other partners, including government. The two initiatives shared some key common elements: national-level coordination by CFC, local input from the individual community foundations, and the involvement of a range of other partners, including the private sector and the federal government. These case studies also feature some significant differences, most notably that, in the case of the Community Fund for Canada's 150th, the Fund was seeded by the government of Canada and then matched by community foundations, whereas it was the private sector that seeded the Welcome Fund for Syrian Refugees. While the federal government was a major stakeholder in the rollout of the Welcome Fund for Syrian Refugees, no public dollars were involved.

In terms of other similarities, the two initiatives involved shared motivations and benefits, ones that align with the existing literature on collaboration, including a growth in impact, influence, and learning opportunities (Prager, 2011; Glass & Pole, 2017). Each organization involved in these collaborations had their impact extended in terms of dollars available, geographic areas served and number of Canadians engaged. CFC and participating community foundations also extended their influence as a result of these collaborations, reaching new audiences, new media, and new partnerships. There were extensive learning opportunities from both of these initiatives for CFC and the individual community foundations, which may open the door for mobilization of more place-based foundations in the future.

While these two case studies reflect some of the motivators and benefits behind funder collaboration, they challenge the assumption in the literature that community foundations only engage in collaborations that are place-based. Indeed, the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th demonstrate that community foundations can develop powerful mobilizations towards shared inter-regional or national outcomes that go beyond capacity-building, mergers, alliances, and knowledge exchanges. In both cases, community foundations led through their deep roots in their local community and, when aggregated, collectively created a groundswell of local efforts that worked towards national objectives.

As previously mentioned, Glass and Pole group the taxonomies of collaboration into two broad categories: “‘light-touch’ collaboration [where] participants generally retain their full autonomy over strategies and granting procedures [and] deeper, more integrated forms of collaboration requiring partners to establish joint objectives and ways of working” (2017, pp. 66–7). Both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th were hybrids of these two models. On the one hand, participating community foundations entered into the space of “deeper” collaboration, aligning strategic efforts, funds and operations towards the shared goals of rallying support for the settlement of refugees or the engagement of Canadians in community-building initiatives. This was particularly true in the case of the Community Fund for Canada's 150th, which involved deep operational collaboration that was necessitated by the funding relationship with the government of Canada.

On the other hand, through both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th, CFC was committed to keeping these collaborative efforts as “light touch” as possible by creating space for participating community foundations to maintain autonomy over the broader strategies of their foundation. This interplay between “deeper” and “lighter-touch” collaboration was a balance managed by CFC, one that was made more delicate when also accommodating the needs of partners including private contributors and the government of Canada.

This balance reflected two of the main challenges that the literature identifies with collaboration between funders: the loss of control and operational autonomy (Gibson, 2009; Morris, 2014; Kabel, 2016; Pfitzer & Stamp, 2010). CFC worked to accommodate and create operational flexibility for community foundations whenever possible, and in some cases was required to uphold core design elements that had been agreed upon with corporate or government partners. At times, this was a source of frustration for the individual community foundations that were not accustomed to working with CFC or another external partner in this way.

Beyond the challenges identified in the literature, CFC experienced a range of other dynamics when leading on the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th that expand the understanding of the challenges raised by interorganizational collaboration. A few key areas were particularly salient: navigating multi-layer partnerships, broader power

dynamics, and questions about accountability. The pages that follow will highlight those dynamics, as well as the core questions and lessons learned by CFC.

Navigating partnerships in rapidly changing contexts

As described in the overview of the two funds, neither the Welcome Fund for Syrian Refugees nor the Community Fund for Canada's 150th were strictly collaborations involving community foundations – both involved the active participation and financial contributions from other partners, including private-sector organizations and the government of Canada. Navigating the many layers of these relationships while also delivering robust initiatives required nuanced and principled decision-making.

In the case of the Welcome Fund for Syrian Refugees, the government of Canada was a main stakeholder and partner in the design of the program, despite the fact that the funds themselves came from the corporate sector. It was CFC's perception that the government hoped that the Welcome Fund for Syrian Refugees would align with their own process and, in particular, would assist with the pressures to move refugee families through shelter/hotel housing and into permanent housing (local rental). CFC and corporate donors shared this vision and generally focused on different priorities only when local community foundations and service organizations reported that other local priorities had been identified that needed resources.

In the case of the Community Fund for Canada's 150th, the moment of Canada 150 arrived in the midst of a political transition. Early conversations about a potential Fund and Canada 150 had begun under the Conservative government led by Stephen Harper, with an initial focus on “encourag[ing] Canadians to learn more about their history, commemorate events, celebrate accomplishments and honour people that helped shape what Canada is today” (Levitz, 2015). The election of Justin Trudeau's Liberal government in October 2015 saw a pivot in the narrative around Canada 150, with a new emphasis on “diversity and inclusion, reconciliation from nation to nation with Indigenous people, the environment and youth” (Wherry, 2016). CFC adapted to this pivot while continuing to uphold the primacy of local leadership and community priorities, which required careful relationship management. Despite these changes, however, both the Conservative and Liberal governments shared an expressed desire to work with community foundations to complement their own larger, concurrent grantmaking efforts, and to ensure that Canadians were directly engaged in Canada 150 at the community level.

As far as both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th are concerned, CFC and community foundations grappled substantially and continuously with the challenge of balancing the needs of government stakeholders; the moral obligation to understanding community-level contexts, insights and priorities; and a commitment to upholding local decision-making. For example, CFC repeatedly wrestled with the ethical elements of collaborating with the federal government on a national narrative that was connected with a contested space – 150 years of confederation – while CFC was, at the same time, working to build authentic relationships with Indigenous peoples and increase its organizational capacity as an ally in reconciliation and restoration. While CFC generally wanted to act collaboratively with government, it was also clear that the local knowledge and leadership of community foundations was fundamental to the Fund's ability to achieve the most impact with limited resources.

Throughout both case studies, CFC grappled with the tension between a desire to be thoughtful and deliberate in design and implementation, and non-negotiable timelines: the Liberal government had publicly set an ambitious “deadline” for achieving the settlement of 25,000 refugees, and the “2017” timeline associated with Canada 150 was understandably immovable. Ultimately, CFC staff created a distinct set of principles for each initiative that would act as a “playbook” in relationship management, decision-making and implementation.

In the case of the Welcome Fund for Syrian Refugees, the following principles guided decision-making when CFC was navigating relationships with community foundations, corporations and government:

- Prioritize the needs of refugees at all times, and align resources with and for refugees arriving in Canadian communities
- Use funding for the highest priorities, recognizing that there's not enough to fulfil all needs
- Stay true to the purpose of the Fund, but be nimble enough to respect and respond to local needs shared by communities
- Look for opportunities to build a legacy of lasting relationships and best practices
- Respond to the urgent nature of the situation, while keeping an eye on sustainability and a focus on the long-term

CFC used a similarly principled approach when navigating the needs of the 176 community foundations for the Community Fund for Canada's 150th:

- Create space and respect for local leadership
- Align the national narrative and vision with local priorities, and broaden that narrative as much as possible to be inclusive of new/alternative perspectives
- Prioritize the inclusion of many perspectives
- Make all operational and funding decisions in collaboration with local partner who can advise on what's best in a specific community

- Look for opportunities to build relationships in distinct geographies (e.g. Northern Canada) to ensure that funds reach the broadest number of Canadians possible

These sets of principles are not directly comparable to one another, as they were used to make different kinds of decisions. In the case of the Welcome Fund for Syrian Refugees, these principles helped guide the Fund's design and spending decisions. By contrast, the principles used to guide the Community Fund for Canada's 150th were specifically about the program design and the broad allocation of funding to various geographies – the funding decisions themselves were made by individual community foundations, and were based on criteria identified through their own local leadership.

These differences aside, this principle-oriented, decision-making approach proved fundamental to managing nuance and complexity in collaborative relationships – especially as both initiatives saw rapid change and emergent developments to which community foundations and CFC had to respond.

Accountability: To whom and for what?

A host of accountability-related dynamics emerged through the experiences of the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th, raising questions about philanthropic-government partnerships as well as the nature of philanthropic accountability more generally.

In leading the Welcome Fund for Syrian Refugees, CFC navigated partnerships with government and the corporate sector alongside the goal of leading a philanthropic response to a real-time effort to help families fleeing Syria and arriving in Canada. These efforts played out in January 2016 – the same January that saw the ramp-up of Donald Trump's election campaign in the United States and the release of his first television advertisement that promised to “ban Muslims” and “build a wall” (Holpuch, 2016). By contrast, the government of Canada had recently declared a goal of granting asylum to 25,000 Syrian refugees (Zilio, 2016). CFC was aware of potentially divergent perspectives across the Canadian landscape on the arrival of the wave of refugees from Syria when it undertook the Welcome Fund for Syrian Refugees, and began conversations early with over 25 community foundations across the country as the project was seeded. Ultimately, one community foundation did decline to participate out of concerns about how their local community felt about the arrival of newcomers but, in general, both CFC and its members were excited to express shared values around belonging and diversity.

Issues of fairness and justice are always relevant to funders, and the large scale and public nature of these two funds put these questions in sharper focus. CFC was accountable to partners but also

understood the work and the role in a broader context of the Canadian welfare state, the rights of residents and social cohesion. For example, throughout the Welcome Fund for Syrian Refugees, staff at CFC were repeatedly challenged by a core question: What did the need for the Welcome Fund for Syrian Refugees, and in particular its focus on (temporarily) supplementing the monthly budgets of refugee families above the level being provided by government, say about the adequacy of that core support to refugees in the first place? Further, given that the federal monthly Refugee Assistance Program cheques provided to refugee families are pegged to provincial monthly social assistance rates, was CFC now operating at the margins of the fairness and adequacy of Canada's social safety net? How could the CFC grapple with its role in specifically supporting Syrian Refugees, when so many others who also had acute housing needs – other refugees and Canadians alike – were not afforded similar support? What were the risks of providing one group of people with a benefit that others were not receiving? There are no sure answers to these questions, but CFC benefited from raising them continuously. Reflections of this nature are integral to strengthening collaboration.

The Community Fund for Canada's 150th posed very different questions about accountability. On the one hand, the government of Canada's contribution of \$8 million in grantmaking dollars was granted to local projects on the basis of decisions made by the boards of directors at community foundations across Canada, ultimately involving over 800 Canadians in making decisions about the best use of federal funds in their own communities. This model presented a unique opportunity for Canadians to be responsible and accountable for decision-making on federal dollars, as the boards of directors of community foundations typically comprise local leaders with roots in the community and deep local knowledge. Their involvement in the decision-making process introduced an element of grassroots, "democratic" decision-making, rather than centralized, ministerial-directed grantmaking from Ottawa. Government officials and community members alike identified this as a unique and important offering, which raises the question: how can community foundations or other local leaders engage in decision-making about community-level funding priorities?

On the other hand, through the Community Fund for Canada's 150th, participating community foundations were required to provide matching dollars to the seed contribution from the federal government. The Fund's emphasis on reconciliation, inclusion and belonging – and the fact that it was seeded by the government of Canada – raised questions for some as they reflected on Canada's colonial history and the persisting inequalities that run along socio-economic, gender and ethnic lines. In response, community foundations and CFC sought to create space for critical dialogue, and to balance the projects that were celebratory in nature with those that involved difficult conversations and tackled deep community priorities. Nonetheless, this challenge does raise core questions: if community foundations serve, and are accountable to, their immediate local community, to what extent should they be involved in forwarding national objectives that originate outside the community? More broadly, as explored by others (Hall & Reed, 1998; Cohen,

2012; McPhee-Knowles & Bowland, 2016), to what extent should philanthropy be involved in advancing government priorities?

Power dynamics

A number of authors have noted that when funders work together to increase their own efficiency and effectiveness, they can amplify existing inequitable power dynamics between funder and grantee (Glass & Pole 2017). Through both the Community Fund for Canada's 150th and the Welcome Fund for Syrian Refugees, CFC reflected regularly on the ways that power dynamics emerged from a number of different angles.

Regarding both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th, government leaders and corporate partners expressed interest in working with community foundations with the intent to move decision-making power into the hands of community members. While this segmented some of the larger power dynamics at play, local leaders who sit on the boards of directors of community foundations tend to already have positions of power in the community. A regular point of discussion among community foundations is the ongoing need to increase the diversity of representation at the board table. With changing demographics in Canadian communities, to what extent do the boards of directors of community foundations reflect their community and truly understand their needs? A partial answer is that, in both case studies, gaps between the community foundations' power and local community members' experiences were narrowed through community/local organizational engagement and public dialogue about local priorities.

In both cases, there was also a question about the way power and available funding can influence local priorities. In what way does introducing new funds in a community alter or distract from ongoing and pressing local needs? In the case of the Community Fund for Canada's 150th, CFC received feedback from individual community foundations that, while the funds were appreciated and dedicated to meaningful local initiatives, the large-scale, national initiative diverted the community foundation from their own strategy and reduced their sense of autonomy. Further, the Community Fund for Canada's 150th stated in its eligibility criteria that projects were required to demonstrate an ability to match the value of the grant requested in cash or in kind. While this helped grow the overall impact and momentum around the Fund, it also privileged applications from groups that had access to other forms of support.

The very occasion of Canada 150 meant that the Community Fund for Canada's 150th was laden with complex power dynamics. The Fund's vision for the sesquicentennial was one of reconciliation, inclusion, and belonging – an outlook that raised questions for some as

they reflected on Canada's colonial history and the persisting inequalities that run along socio-economic, gender and ethnic lines. To address this, CFC sought to listen and learn from these perspectives, and to be inclusive of alternative narratives that enriched the local and national conversations about Canadian communities and Canada as a country.

Looking ahead: Moving from responsive action to agenda setting

A final feature shared by both of these case studies is their responsive nature. While CFC and participating community foundations played key roles in shaping the initiatives, both the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th arose in response to external forces including world events and public policy decisions – the decision to welcome 25,000 Syrian refugees to Canada, and the occasion of Canada's 150th anniversary of Confederation. As CFC closed these initiatives and looked to the future, a new set of questions emerged: What opportunity is there for place-based foundations to mobilize around persistent and systemic issues at scale? How can philanthropy work together to set the agenda for change through collaborative action?

At the time of writing, in November 2019, CFC is engaged in three pan-Canadian initiatives that developed from the partnerships and learnings that were first laid by the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th:

- The RBC Future Launch Community Challenge, a partnership between CFC, the RBC Foundation, and 81 participating community foundations. The Challenge supports youth leadership in small and mid-sized communities – those with fewer than 150,000 inhabitants – through grants to youth-led projects as well as community convenings.
- The Investment Readiness Program, funded by the government of Canada. This initiative created opportunity for community foundations to work with local organizations focused on social enterprise to promote readiness for investment and social finance activities among social purpose organizations, at the local level.
- The Gender Equality Fund, a multi-year collaboration between CFC and the Equality Fund, with support from the government of Canada (Department for Women and Gender Equality). This initiative will work with community foundations in every province and territory to advance gender equality through a mix of grantmaking, gender-lens investing, and learning opportunities.

Each of these initiatives is still underway, and early observations identify core commonalities with the observations from the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th. In addition, these newer initiatives have highlighted unique and distinct dynamics.

First, when inviting collaboration in systemic areas, the different collaborating foundations have come to the table with a range of familiarity and capacity. Whether related to the initiatives seeking impact related to youth employment, social finance, or gender equality, there are community foundations that have been long-time leaders and others that are entering these conversations for the first time. The community foundations' range of experience and capacity has provided CFC with an opportunity to invest in resources to ensure that all participating foundations have a shared understanding and set of tools to support their engagement. In many cases, this has presented opportunities for peer-learning between community foundations, and in others it has involved collaboration between community foundations and other local organizations with deep subject-matter expertise.

Growing on the groundwork laid by the initiatives discussed earlier in this chapter, these current opportunities for collaboration recognize that foundations need to shift power and involve different decision-making processes to seek deeper, systems-level change. Increasingly, CFC has required, or at least created opportunities for, collaborating community foundations to include other voices in their decision-making processes – voices that have a depth of lived experience and subject-matter expertise. For example, community foundations that participated in the RBC Future Launch Community Challenge were required to involve at least two community members between the ages of 14 and 29 in the decision-making process. The Investment Readiness Program invites participating community foundations to partner with a host of other local organizations with expertise in social finance. The emergent work around the Gender Equality Fund encourages community foundations to include gender specialists in the decision-making process. These commitments to engaging new voices in the decision-making processes has opened opportunities for greater impact, and has also added complexity to the initiatives and the collaborations involved.

A third and distinct development of these newer initiatives is the move beyond grantmaking and convening (which were the primary levers of the Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th) to efforts to set the local agenda and shape local dialogue in the areas related to youth employment, social finance and gender equality. Each of these three new initiatives has a focus on some combination of local dialogue, community events, monitoring, and developmental evaluation, which will gather important key learnings not only about the nature of the collaboration, but about the areas of impact themselves. They also involve public engagement and thought-leadership activities, like the creation of local and national Vital Signs reports that will highlight a range of indicators. In doing so, this collaboration between place-based foundations may offer important contributions in shaping public policy and advocating for “upstream” solutions at the local and national level.

Overall, the RBC Future Launch Community Challenge, the Investment Readiness Program, and the Gender Equality Fund each build from the earlier Welcome Fund for Syrian Refugees and Community Fund for Canada's 150th. Even at their early stages, these three current initiatives offer new learnings and highlight distinct opportunities and challenges as they engage action and dialogue around systems level changes. CFC will continue to monitor the further lessons they offer about the potential of collaboration between place-based foundations.

Conclusion

The limited attention that the literature gives to collaborative efforts between community foundations suggests that they rely on their immediate geographic areas as place-based funders. Community foundations have limited reasons to collaborate among themselves, such as the potential for capacity-building, learning and mergers. In recent years, however, CFC has led two distinct national, collaborative initiatives that demonstrate the potential for further collaboration between community foundations, and for the mobilization of a network of community foundations around a national-level vision. And at the time of writing there are three more collaborative initiatives underway!

The Welcome Fund for Syrian Refugees and the Community Fund for Canada's 150th demonstrate ways that place-based philanthropy can mobilize their individual local leadership towards a collective national outcome. These two initiatives were unique to the Canadian context, and yet they offer insights about the power of mobilizing place-based philanthropy that could be activated for future efforts in Canada or in other jurisdictions. These initiatives have demonstrated the potential for movement-wide collaboration, and have opened the door for further agenda-setting and leadership by the community foundation movement in areas including youth leadership, social finance and gender equality.

While these two initiatives achieved outcomes that far surpassed what would have been possible for any community foundation or national organization to achieve in isolation, they also raise a number of challenges. In both cases, community foundations had to grapple with core questions about their own organizational autonomy and decision-making. In addition, CFC gained an important understanding of how to manage political relationships, accountability and power dynamics – all of which offered important insights for future initiatives. They raised other important questions that merit consideration:

- How do partnerships between government and philanthropic organizations affect the accountabilities of each, and their interaction with democracy more broadly?
- How might initiatives like these increase our understanding of the leadership roles that community foundations can play locally?
- What similarities, differences and themes would emerge if these case studies were compared with

collaborations that involve a broader set of funders rather than exclusively community foundations?

- How does collaboration between foundations and other sectors accentuate or diminish issues of power and privilege that are often part of funding programs?
- With respect to collaboration with government, what is the relevance of core beliefs around the role of government and/or the appropriateness or adequacy of government programs and services?
- What other complex issues may benefit from these kinds of national/local mobilizations through community philanthropy?

As we look to the future, these methods of mobilizing community philanthropy around larger visions offer an important opportunity for other national and global visions. What might be possible when local leaders and place-based foundations are invited to identify the challenges in their own communities, and then to look beyond their geographic bounds at ways in which they can increase their impact by connecting with others? The SDGs, for example, take aim at enormous global outcomes like “no poverty”, “zero hunger” and “ending poverty,” calling for action at both the local, national and global scales. How might community foundations, each working in their own communities, be rallied around the SDGs to ultimately do their part to address these significant and complex challenges?

CFC appreciates that the Canadian network of community philanthropy is more connected and mobilized than in many other philanthropic contexts, and that these kinds of network-wide mobilizations might not be replicable in other countries. Nonetheless, community philanthropy is an area in the philanthropic landscape that continues to grow. When considering the potential for philanthropic organizations to collaborate in the service of the complex national and global issues, and the potential for philanthropic organizations to work together to address these issues as they manifest themselves at a local level, community philanthropy is an important, thoughtful and engaged component of the philanthropic ecosystem.

Three key takeaways

1

Place-based foundations are capable of simultaneously collaborating on national issues and local goals, as long as specific supports are in place.

2

When navigating cross-sectoral collaboration with the private sector and/or governments, a lead organization can play an important role in assuming accountability and responsibility for this partnership while upholding the primacy of local leadership.

3

Deep collaboration calls for the need for explicit principles to navigate multi-layer partnerships, broader power dynamics and accountability.

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