



Event Note

PhiLab Ontario Hub Regional Conference 2021

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The Role of Grantmaking Foundations in Restructuring Ontario's Philanthropic Action: Throughout and Beyond the COVID-19 Crisis

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*(in collaboration with François Brouard, Manuel Litalien and Isidora Gievski-Sidorovska)
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The **Canadian Philanthropy Partnership Research Network / Réseau canadien de recherche partenariale sur la philanthropie (PhiLab)**, is a Canadian research Network on philanthropy with a head office in Montreal, at the Université du Québec à Montréal (UQÀM). The Network is divided into several regional hubs across the country and works in tight collaboration with international research units.

PhiLab's Ontario Hub hosted a three-afternoon regional virtual conference with the purpose of bringing together established and emerging scholars, grantmaking foundations, and philanthropic organizations to develop a common understanding and direction on the challenges and priorities of philanthropic action in Canada and Ontario. Isidora Gievski-Sidorovska was the conference organizer in collaboration with Manuel Litalien and François Brouard, co-directors of Philab Ontario.

The conference had three key objectives:

1. Develop common understanding of current and future challenges faced by philanthropic organizations in Canada.
2. Establish joint research and development agenda for Ontario, integrating and coordinating the efforts of various actors (scholars, grantmaking foundations, community organizations and intermediary philanthropic organizations).
3. Identify common priorities for collaborative partnership among new and emerging scholars, practitioners, and other philanthropic organizations.

The conference themes by day were:

Day 1: Post-COVID reality: Challenges and priorities faced by community organizations

Day 2: The role of foundations in restructuring post-pandemic philanthropic action

Day 3: Establishing a joint philanthropic research and development agenda for the Ontario region



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Day 1: Current state of the sector and future challenges and priorities

Opening remarks: Jean-Marc Fontan (PhiLab/UQAM) & Manuel Litalien (PhiLab/Nipissing University)

Dr. Litalien, co-coordinator of the Ontario Hub opened the event and greeted guests and invited Dr. Fontan, PhiLab's co-director, to open the first annual conference for the Ontario Hub by introducing PhiLab and thanking attendants. This was followed by an address by Isidora Sidorovska, who presented the agenda for the three days and introduced the keynote speaker.

Keynote speaker: Andrew Chunilall, CFC

Andrew Chunilall, CEO of Community Foundations Canada (CFC), began his keynote address by presenting the key theme of transformation. He noted that the goals of safety, security, and comfort will be reached eventually; however, transformation will be a common theme in upcoming years. Status quo and change are not good enough; what communities require is transformation. According to Chunilall, transformation that extends to philanthropy and philanthropic institutions, is required to address the current problems of economic and social inequality. At the moment, philanthropic institutions will not be able to address these needs, including the ones created by a new economy and emerging social outlook in Canada. Philanthropy has an opportunity to engage and lead this new conversation. However, we must first clarify what philanthropy's role in the new economy is, then provide an answer as to how philanthropy will address inequality. Mr. Chunilall underlined that the pandemic has further pressured the sector to find an answer to these questions.

The paradox of philanthropy is that donors are part of the top tier of economic earners. Excess wealth can be used by foundations and philanthropic institutions; however, it is not certain whether they should be considered as a part of the systemic issues driving inequality or part of the solution. The question here is: can philanthropic institutions actually be successful wealth redistributors? Generally, philanthropic institutions are expected to provide grants and support to communities. They distribute the earnings on wealth, but not the capital itself, due to endowments. This endowment method is trickle-down economics, where wealthy institutions are building wealth through capital and distributing earnings. Wealth is noted as a critical outcome of philanthropic success. However, to tackle inequality, we must rethink the notion of permanent endowments and limited disbursement quotas.

Capital is essential, as it provides security, safety, and comfort. Philanthropy is here centered on a system which distributes capital, but also produces it. In our system, capital can grow faster than the economy. Those who hold capital hereby generate capital faster than those earning income. In sum, capital and income do not experience the same growth, with those with capital doing well, and those without, suffering. This will be the case with the COVID-19 economic and social recovery. Philanthropic institutions cannot be part of the solution if they are part of the problem. The common 95/5 model of accumulation and spending needs to be rethought.

Chunilall believes that social enterprises are a primary tool, which bridges a gap between capital accumulation and solving social issues. To tackle inequality in a transformative way, social enterprises need to be invested in redistribution. If we want new outcomes, or transformation,

we require different decision-makers. Trickle-down philanthropy is only part of the problem, cultural issues should also be addressed. It is necessary to have new, younger, diverse leaders and governors. We must acknowledge the challenges before us are located both at the institutional and systemic levels. This is particularly the case for Black and Indigenous communities across Canada. Immigrants and racialized people are underrepresented on boards of philanthropic institutions in this country, whereas having leaders of colour can and will make a difference. Additionally, millennials have greater interest and are more engaged in impact and sustainable investing. The notion of charitable giving has become *charitable living* for this generation. The new cohort has less tunnel vision, seeing the major issues as part of the economy, rather than as externalities. Incremental changes are insufficient, we need transformational changes. If these transformations leave board members uncomfortable, it is time to find new leaders who are bold and resilient. Perhaps, as noted by Mr. Chunilall, the Millennial generation may be those leaders. We need to address the systemic issues and those beyond the boundaries of the institutions to see true transformative change.

During the Q&A period, Chunilall acknowledged a need for significant change in culture for the sector. With its 150-year-old conditioning around what charities do, there is a new call for justice and restitution. Philanthropic institutions need administrators with lived experience to make decisions; there is a generational cultural collision with the new generation ushering in disruption. The latter are diverse and will help create a different way of doing things. We cannot continue to simply fulfill donors wishes but need to address greater community issues and alter donor advised funds to ensure community needs are met. Endowments and the permanency around them need to be rethought. We need to maximize the benefit, including tax benefits. This can be done by investing in social enterprises and spending in the social economy. Additionally, we need to invite the community into the decision-making process itself, including all voices, especially ones that make us uncomfortable.

Session 1: Grantees and the post-COVID reality

1-1: Cathy Taylor: Impact of pandemic on nonprofits and charities

The first session starts with Cathy Taylor, Executive Director of the Ontario Nonprofit Network (ONN). Taylor discussed the impacts of the pandemic on nonprofits and charities. She presented surveys from the sector and lessons learned. She began by noting some key facts about the nonprofit sector in Ontario:

- The sector employs one million individuals, of which, 80% are women;
- There are five million volunteers in the sector
- Compensation levels are lower than national average;
- The sector receives less than half of its revenue from government funding.

Early in the COVID-19 pandemic, at the end of March 2020, ONN sent out a survey to assess its impact. At that point in time, 3/4 of respondents were impacted (e.g., due to canceled events), 1/5 had closed their doors, and 1/3 had laid off staff. She noted that the sector faced a triple threat of combined revenue loss, operational challenges, and resource shortages. Most organizations had only a three-month reserve and were facing an increased demand for services. ONN implemented resources and supports for the sector.

An additional survey was sent out in June 2020. The respondents reported a combined loss of 90 million dollars in revenue. At this point in time, 3/4 had not received support from the government while greater demand for services had continued. Additionally, 1/5 said that they were likely to close their doors permanently, and in some cases, directors using their personal funds to pay staff. However, the sector remained optimistic about the future. ONN advocated for immediate government support for recovery and employee and worker support.

Taylor presented the main lessons learned:

- Impact is uneven based on geography, size, and sector.
- Those with diversified revenue were impacted to a greater extent.
- There were significant impacts due to systematic racism, as the pandemic is taking greater toll on racialized groups.
- Staff are suffering from burnout and layoffs.
- The siloed structure is not working;
- The role of networks has never been more important and effective.

For the recovery process, Taylor noted the importance of supporting a paid workforce, changing revenue models, encouraging volunteerism and grassroots initiatives, sustainable collaboration and partnerships, technology support for remote work and remote services, and modernization of the regulator environment.

Taylor identified a few key takeaways:

- Flexibility and adaptability in funding are possible and required, especially to ease the administrative burden.
- The importance of relationships and building trust between funders and grantees and that reserves are critically important (3 months are not enough). General operating support allows organizations to pivot priorities during a crisis and gives funders an important role to play in supporting staff. She noted the need for long term thinking, racial and cultural equality, and advocating for specific sectors. There is an opportunity to reinvent and recreate these sectors, however, to do this we need support.

1-2: Adam Saifer: Pandemic influences on DEI nonprofits.

Adam Saifer (PhiLab/UQAM) presented a qualitative study on equity-focused grantees which was conducted at the start of the pandemic. Saifer remarked that the COVID-19 pandemic revealed and intensified racial injustice and inequities. The study occurred in the summer of 2020 and included interviews with 30 organizations located in Montreal and Toronto.

Saifer defined an equity-focused grantee as a loose term referring to organizations that had both services and a greater focus on larger equity issues, including LGBTQI+, Black, and Indigenous organizations. He noted that, due to the pandemic, organizations had to pivot and reinvent themselves to provide essential services. Organizations felt a need to re-prioritize and shift their organizational focus on essential services. They were required to expand services and fill in gaps in the public system. Therefore, advocacy work was put on the backburner to focus on services.

COVID-19 exasperated the digital divide with the new dependence on online programming. Saifer identified that arts-based organizations were not always able to present their medium adequately online. Additionally, group-based programs were not always able to create the same community environment online. Saifer noted three main issues that organizations faced due to the pandemic: (1) lack of digital access, (2) lack of organization resources to adapt, and (3) suspension of interactive community-based initiatives.

A bright spot was that philanthropic funders were supportive during the start of the pandemic. They offered flexibility, support, and agility. This created hope among leaders for possible new models moving forward. This also highlighted the need for trust between grantees and grantmakers.

In addition to emphasizing social crises, COVID-19 highlighted concerns about the current philanthropic model. Saifer presented his key takeaways from the research:

- Project-based financing can be a barrier, as many communities need sustained relationship building for years of work.
- The current regulatory model can prohibit grassroots networks and discourage long-term thinking.
- Although the digital divide was a challenge, philanthropy agility and flexibility were a strength and should be continued.
- Concerns for long-term viability of the current philanthropic model, where endowments place a reliance on market performance. This can be problematic for philanthropic funding if the markets experience crises.

1-3: Jean-Marc Fontan: The issue of management and administrative costs

Dr. Jean-Marc Fontan (PhiLab/UQAM) presented a research project on overhead costs in the philanthropic industry with questions around terminology, identifying and distinguishing overhead costs, and cost metrics. He noted that currently, there is no consensus on terminology. He asked several questions about overhead costs including: Should overhead be part of public policy? Are overhead costs representative of philanthropic organizations' performance? What has the debate in the United States taught us? He identified that some approaches to overhead create a starvation cycle where costs cover programs but not always base costs. He asks, what lessons can be learned about the evaluation and importance of overhead costs?

Dr. Fontan differentiated program costs from overhead costs, which includes management/general and fundraising costs. He noted that it can be difficult to find a balance between over and underfunding overhead. This can be represented by the previously mentioned "starvation cycle", which is due to unrealistic donor expectations, competitive pressure, and misleading reporting. Underfunding overhead can result in low salaries, no pension plan, and high employee turnover, which in turn affects the organization's ability to meet its mission.

Dr. Fontan recommends a glossary of terms to achieve stakeholder consensus. Additionally, he mentions the benefit in developing a framework for agreement on management and administrative costs, to assist in conversations between grantees and grantmakers and better

define management and strategic costs. This would also result in a mechanism for concerted action among funders to consider overhead costs in projects. Dr. Fontan identified that the second phase of the research would be to pursue action research with government and nonprofits to develop tools for the glossary and typology.

Session 2: Sector-specific challenges

2-1: April Lindgren: Philanthropic support for Canadian journalism

April Lindgren (Ryerson University) presented her research project on philanthropic support for local journalism. Her project stems from a current decline and loss of local journalism which serves public interest.

Lindgren identified that local journalism is important for several reasons. For one, the presence of verified, timely, independently produced journalism is critical for holding power accountable. Second, there are its community-strengthening attributes such as sharing events, building community identity, and assisting and encouraging individuals to participate in decision-making. A loss of local journalism creates a void which results in misinformation and challenges for government. Canada is currently facing a decline in local news sources, especially due to COVID-19. Because of this, there has been some support from the government to assist the journalism industry. This includes tax credits if journalism organizations apply for donee status.

As part of Lindgren's study, interviews were conducted within the journalism industry. Key recommendations include the following:

- Foundations need to think broadly about supporting news and how a local news organization helps the community (i.e., Reporting on homelessness can increase funding for addressing the problem).
- They need to ensure there is infrastructure for news to support communities; and foundations need to understand who they are partnered with (journalism loyalty needs to lie with the public – the funder cannot influence news).

On the journalist side, they need to:

- provide transparency on funding (such as providing a list of donors);
- Foundations need to look at barriers for marginalized groups (newsroom diversity); and decent pay for journalism needed to be supported by foundations (this will also help with diversity).
- Journalism organizations need a broad range of diverse revenue, which foundations can help provide.

Lindgren ended by noting that philanthropy will not be able to fully support lost advertising revenue.

2-2: Manuel Litalien: The philanthropic ecosystem in Northern communities

Dr. Manuel Litalien (PhiLab/Nipissing University) presented his team's project on philanthropy in Northern communities, which is in its early phases. Philanthropy has been recognized as a vehicle for regional development. However, there are unique challenges and pressures in Northern Canada including the digital divide, aging, and declining populations, low population

density, large geographic distances, and declining membership in traditional service organizations. Additionally, charities in Northern Canada are smaller in size and in number. These factors, combined with population size, matter when receiving philanthropic dollars. Dr. Litalien also identified the importance of meeting the United Nations Sustainable Development Goals (SDG) in Northern communities.

Dr. Litalien noted that there is a distinction between rural philanthropy and Northern philanthropy. While there are limited foundations in rural communities as well, this leaves some questions unanswered regarding the difference between the two. Perhaps, in the North, there are different models of philanthropy? Are the foundations more self-sustainable? Is it mainly project-based funding? This leads to the main research questions: how can the Northern philanthropy ecosystem be defined? Are there differences in this ecosystem? What barriers exist to Northern philanthropy? What roles does philanthropy play?

This project will work towards addressing the absence of research in Northern communities. One challenge is defining what is a Northern community, as there does not appear to be a uniform definition. A second aim of this project is to map the philanthropic ecosystem in Northern Canadian communities.

2-3: François Brouard: Sports and arts organizations in a post-COVID-19 era

The final presentation of the day came from Dr. François Brouard (PhiLab/Carleton University). He presented his project on how sports and arts organizations have been impacted by COVID-19. The COVID-19 pandemic has imposed several restrictions including physical distancing and closed public spaces, which has obviously impacted many organizations. Not only has the pandemic created uncertainties for individuals and basic needs, but organizations have also faced restrictions, a decreased work force, and supply chain issues, and society need to adjust.

A framework for analysis of change has been presented with various perspectives (including human, social, cultural, financial, economic, technological, political, etc.), the role of stakeholders (such as donors, advisors, charities, society) and actions with private, organizational and governmental actions.

Various cases can be examined using this framework. Some cases include professional sports teams and the arts and culture industry and foundations linked with them were briefly examined. These organizations have been greatly impacted and will likely face a slow recovery.

Evening Social: Introduction to the EDGE Funders Model

Facilitator: Juniper Glass

The evening social included a presentation on EDGE Funders Alliance. Juniper Glass and Ariane Shaffer began by introducing themselves, the EDGE organization, and allowing participants to introduce themselves. The focus of their talk was on systemic change and philanthropy, including money, social change, and social justice.

Ariane Shaffer describes EDGE as a home for open, emotional political conversations on philanthropy. They opened the floor to participants to have an informal conversation including introductions from various participants. Main questions that participants were interested in included the following: How can we move forward with systemic change? How should you study a community you don't live in? How can we break down philanthropic activities into bite-sized pieces? How can we map what philanthropy looks like? How should we engage with different cultures? What are the next steps in transforming philanthropy? How can we attract new people to the field? How can we raise awareness? What is the EDGE approach? How can we move forward with social and environmental equity? How can we get better information for charities and for sector? What are the matrices of success for a grantor? What are the differences between being a storyteller or story-taker?

EDGE is an international membership, member-lead organization. It serves funders as well as works towards building a global learning community for funders. The purpose of EDGE is to build unity and transform philanthropy. There are over one hundred members, mainly in the Americas and Europe. They provide tools and training to donors as well as facilitate a community among the donors. They tend to stay away from codifying and rather encourage participatory methods and methods open to movement and change. When encouraging systemic change, EDGE believes that the community element is essential as the issues are too big to tackle alone. Relationships and collaboration are key and that is how a ripple effect can be created. EDGE is a space for motivation and partnership.

Day 2: Role of foundations in restructuring philanthropic action post COVID-19

Session 3: Grantmaking foundations and their response to the current crisis

3-1: Isidora Sidorovska: Foundation responses to COVID-19

Isidora Sidorovska (University of Waterloo) presented her study on how COVID has affected the charitable sector. Beginning in May 2020, four exploratory case studies and interviews were conducted, to determine how grantmaking foundations have responded during the pandemic. Specifically, how do these identified changes relate to dominant philanthropic practices and long-term development. The case studies included: The Lawson Foundations, IRPF (Indigenous Peoples' Resilience Fund), the GIVE5 Campaign, and re-examining the role of grantmaking foundations in a changing society (reports are on the PhiLab website).

The case studies revealed an increase reliance on local expertise. During the crisis organizations turned to local leaders and community partners for assistance in allocating funds that was tailored to local needs. There were also change in funding practices. Organizations prioritized a bottom-up funding approach where greater authority was given to grantees to allocate funding. There was also a loosening of rules and regulations, which helped to reduce administrative burden and ensure that funds could be moved at an expedited pace. The purpose of these changes was to have organizations to focus on community needs and mission-related actions, however it also meant lesser focus on accountability and monitoring. There was also an increase in collaboration as funders prioritized joint ventures. Multi-funder efforts allowed for greater contributions, less operating costs, swifter exchange of information, and complimentary rather than doubled efforts

Additionally, there was emphasis on learning, growth and defining best practices. Organizations had to focus on balancing rapid responses with long term goals (i.e., short vs. long term) and ensuring strategic effectiveness with scarce resources and emergency needs.

Key takeaways of this study include the importance of trust, flexibility, empowerment, collaboration and a more equitable relationship between funders and grantees. The study revealed a need to re-examine policies that regulate giving. It identified the importance of a bottom-up approach to funding to better meet community needs. Future research opportunities include examining how increased flexibility, and more equitable funder-grantee relationships [affects the mission-related performance of these organizations](#).

3-2: Paloma Raggo: Delphi Study - COVID-19 & Philanthropy

Dr. Paloma Raggo (Carleton University) presented her team's progress *Utilizing the Delphi method to understand the effects of COVID-19 on the philanthropic sector*. Their study included a participant sample of twenty-one foundations and followed the Delphi process, where participants answered questions every six weeks and responses were tracked over time. Question themes included change, adaptation, collaboration, information and data, governance and HR, challenges, diversity equity and inclusion, and a future outlook.

The results showed consistency. Participants perceived change and adaptiveness consistently over the period. This demonstrates that the pandemic's affects were incremental and foundations were skillful at adjusting over time. Additionally, regarding innovation, most

organizations reported internal innovation, rather than external innovation. Additionally, there was innovation through partnerships, including deepened collaboration within existing partnerships. One common theme when asked about challenges was pandemic related anxiety. This shows the importance for foundations to look inward and examine pace of work and workload management. When examining diversity, gender parity was the most achieved diversity dimension while lived experience was the weakest.

As part of the next steps for this study, the team will be conducting interviews with participants to gain deeper understanding.

3-3: Megan Conway: The role and capacities of community foundations

Megan Conway (Carleton University) presented their early-stage comparative study on community foundations. The research focused on comparing the Canadian versus Australian experience of how community foundations contribute to community leadership, especially in times of crisis. Their study hopes to create a framework for community foundations, which is especially pertinent now, given the systems changes at local, national, and global scales. This may result in shifting funding streams and funding opportunities and has the potential to reinterpret the role of community foundations.

The study began by interviewing key individuals and preliminary analysis on content found on websites, blogs, annual reports, publications, and social media (Twitter). Emerging areas identified included public health, climate and environment, structural inequality, welfare, best practices, partnerships with government and others, and internal environment. There will be further coding for local versus national issues as well as the purpose of post (i.e., awareness, call to action, partnership building, etc.). Preliminary findings include differences in perception pertaining to climate change and public health. This leaves the researchers with questions such as: is there a shift due to the crisis? What role do peak bodies play in crisis? What are their community leadership roles?

Session 4: [Grantmaking priorities and the role of foundations in enabling a more resilient grassroots sector](#)

Three perspectives were presented about grantmaking priorities: 1) the role of foundations in enabling a more resilient grassroots sector, 2) the rationale and 3) the steps taken by foundations to support sector restructuring.

4-1: Marcel Lauzière, Lawson Foundation

Marcel Lauzière (Lawson Foundation) made a presentation on the role of private foundations and operational funding to build resilience, using examples from the Lawson Foundation. He began by introducing his organization, which works in the fields of healthy development of children and youth as well as impact investing.

Lauzière noted that resilience is something built overtime that can be challenging to develop. This is especially true for organizations that are struggling due to lack of support for their operational expenses and human resources. To aid their success and resiliency building, organizations need access to legal, financial, and technological support. These are activities that are not typically covered in project-based funding. Meaningful operational funding allows for organizations to access the right expertise at the right time. Therefore, a paradigm shift is needed to expand areas covered by operational funding.

Lauzière also discussed the role of charities and nonprofits in public policy advocacy. He identified the need to play the long game to bring about public policy change. He asked about the role private foundations should take and noted that they can take risks that public organizations cannot. He identified a need to have trust and strong relationships with partners and that it is important to think deeply about trust-based philanthropy. He also questioned reporting requirements and their usefulness to foundations, suggesting that reporting needs to be more meaningful, linked to resilience, and to have clear intent. Time to write reports is time away from the mission. Unhelpful reporting will not build resilience.

He concluded by offering the following suggestions for building philanthropy organization resilience:

1. Sustain key infrastructure organizations (i.e., ONN, Imagine Canada) to ensure that the sector is maintained.
2. Support organizations based on proximity and facilitate space sharing of like-minded organizations
3. Support overhead costs, and encourage unrestricted grants and funding.
4. Provide HR, legal, and governance support.
5. Support expert advice (including marketing, strategy, and business development)
6. Use impact investing to compliment grants
7. Encourage two-way accountability with grantee and grantor, rather than encouraging outcomes and reporting.

4-2: Gillian White, Ontario Trillium Foundation

Gillian White (Ontario Trillium Foundation) presented the use of data to maximize impact during COVID-19. She began by introducing the Trillium Foundation and their mission, including their process for distributing grants. When COVID-19 hit, the organization used surveys to reach out to nonprofits and determine the needs. Questions included: how did COVID-19 impact community needs, how did COVID-19 impact organization needs, and how are funders responding (are there redundancies or gaps).

Their survey results noted an increase in demand for certain sectors, such as food security, social services and health sectors, domestic violence, social isolation, and mental health. Additionally, when asking about organizational impact, they identified that certain sectors (i.e., arts and culture and sports and recreation) had a hard time adapting to virtual programming and many had to close their doors. Other organizations were not sure they would last another six months.

Some actions identified to assist organizations include reducing the administrative burden, streamlining applications, and providing small grants to as many organizations as possible. This was not emergency funding, due to lack of speed, but rather recovery response funding. These funds supported organization through adapting programs, equipment procurement, developing new revenue generation streams, creating new partnerships, and supporting staff development. They noted there was a large demand for funding. They used the application process to collect additional data.

Key takeaways included:

- A great need for funding as organizations found it challenging to deliver on their mission and pivot their programming.
- Good data to determine who needed help most and how to get it to them. Community data is useful but can be challenging for funders to get, especially in a timely way and for immediate impact. This is particularly challenging when the ground is shifting, such as during a pandemic.

Moving forward, the ONN would like to have a sector map and a demographic map. They would also encourage funders' to collect data and to share it widely to avoid the development of initiatives in silos.

4-3: Ruth Crammond, United Way Greater Toronto

The third presentation of the panel was by Ruth Crammond (United Way Greater Toronto). She presented her organization's learnings from the COVID-19 pandemic. She began by introducing the United Way and their pre-COVID activities, which include rebalancing opportunity equations and bringing equity and reconciliation to neighbourhoods being left behind. When the COVID-19 pandemic began, United Way asked funders what kind of funding they needed and offered flexibility on grants. Crammond noted that, historically, United Way provides long-range funding, however, after the pandemic began, the focus shifted to speed and responsiveness.

Crammond presented their cluster mapping tables, which group together the Greater Toronto neighbourhoods. She explained that during the pandemic, they met with representatives from individual clusters to help meet specific needs and share resources. Their focus was on small community funds going out to smaller grassroots organizations. They also distributed emergency federal funding for community support. This was done within a couple of months, demonstrating their ability to react quickly. They noted that geographic distribution is important for local responses and that equity-seeking groups are most affected by poverty and the pandemic.

Crammond concluded by summarizing what was learned through the COVID-19 response. She identified that different granting approaches were required to address different problems. They needed to offer smaller, low-barrier grants to grassroots organizations and emergency community funding for larger community support. They also noted that their network of agencies was an asset to ensuring there was infrastructure to deliver programs. This network of agencies was essential for fostering partnerships with smaller organizations and foundational organizations to create an ecosystem.

Evening Social for Students

Facilitator: Katherine MacDonald

The evening social for students included a presentation by Mary Barroll from Charity Village. She presented their online resources which included the largest Canadian online job board dedicated to charities and nonprofits as well as content, resources, and services. She introduced their three job boards: Talent Egg, Charity Village, and Bmeaningful (their newest addition that includes postings for social impact organizations). She also noted that they publish various survey reports for the sector, including compensation reports. Lastly, she discussed opportunities for new graduates, the need for tech-savvy individuals, and the importance of volunteerism and networking.

The second half included a presentation lead by Katherine MacDonald. She shared some of the PhiLab student research funding available for various student-led projects. She noted there were many publication opportunities, including blog posts, interviews, book reviews, and podcasts. She noted other PhiLab opportunities for students such as student supports, networking, student awards, and study days. She then led a group discussion on ways to get students involved. Discussion ideas included co-authorship opportunities, networking events, peer-editing, training, and mentoring activities.

Day 3: Development of a joint research and development agenda

Panel 1: Identification of sector priorities for future research and development.

Brief presentations from three different perspectives followed by panel discussion and questions.

Scholar: Susan Phillips, Carleton University

Dr. Susan Phillips presented on possible research priorities and a potential research agenda for the sector. She noted that research agendas do not always come to fruition, but she is hopeful that the idea of data sharing is achieved as it would be beneficial for the sector to have a common database.

Dr. Phillips identified a need for mechanisms to ask the right questions. Questions need to be significant and important to the sector. We need research that matters, that has an impact, and that provides results in changing the system. There is a need for transformational big questions and racial movements, especially following the COVID-19 pandemic. Data infrastructure and using data in meaningful ways would constitute two important step forward.

She also noted the necessity for a long-term vision, mainly through education. She identified that Canada's philanthropic research is underdeveloped compared to other countries and there is less multiplicity of methodology. There is an obligation to train research students and to

develop a stronger, bigger toolbox. She stated that for successful research to take place, it should be on the government's and the philanthropic sector's agenda.

Finally, to answer transformative questions, there is a need to document what is happening now, as we are in the midst of important change. Now is a good time to:

- Check-in and evaluate how research and the philanthropy sector are doing.
- Document, analyze and understand what is distinctive about Canadian philanthropy.
- Explore the new philanthropy that is emerging due to a shift in power.
- Enhance resilience, and evaluate policy and regulation.
- Reform funding, including less restrictive funding.

Foundations: Jean-Marc Mangin, PFC

Jean-Marc Mangin, of Philanthropic Foundations Canada (PFC), identified that we are at a crossroads and in uncharted territories. We are experiencing a massive political, economic, and social shift which has been accelerated due to the pandemic. He noted that when coming out of crises in the past, we implemented new systems, such as was the case with WWI and WWII. He then asked about what role philanthropy should play in this reform. Mangin noted a critical role for research and data in informing both practice and policy.

Mangin identified several questions to help in this reformation process. What choices need to be made? What is good practice? How does unrestricted funding affect organizations? Are current changes temporary or permanent? Are looser agreements and trust-based philanthropy possible? Will there be different relationships? What have been the benefits of local responses versus global responses? How has new policy impacted Canadians? What influence does government policy have? Is long-term or short-term engagement better? How can we improve diversity, especially in family foundations? Why has the reconciliation process been so slow? How can we accelerate progress?

Mangin states that we cannot go back to established pre-COVID patterns. We should instead look at intent and impact. There is a need to evaluate strengths, weaknesses, opportunities, and risks to shift the current frameworks and develop a new and stronger philanthropy agenda in Canada. We should rethink mission, seize the moment, perform action research, and encourage partnerships with learning organizations. Mangin calls for ambitious research questions to address this transformation.

Community organizations: David Lasby, Imagine Canada

The final panel member, David Lasby (Imagine Canada), presented research and development from the perspective of community organizations. He noted that, during the COVID-19 pandemic, their attention and focus changed. He identified information technology (IT) as a priority and saw that IT demand increased, especially when relating to program development. Other trends noted were decreased fundraising and revenue generation emphasis.

Lasby discussed an information or needs hierarchy. He noted that there is distinct information produced relating to different aspects of the organization and that some information is more important than others. From their study, they identified that infrastructure/process information was rated with the lowest need. As for environment, trends, and optimization, they were in the middle. Interventions, impact, and activities information had the highest importance. From a research perspective, he noted that the information of higher importance (the top of the hierarchy) was more specific, where the bottom-rated information had greater commonality. This presents a research challenge. He also identified that the more common research has lower return on investment (ROI) while a high ROI can be achieved for specific research. This benefit is accrued to Canadians.

Lasby further discussed some of the challenges found in research. He noted that the list of challenges is always growing and that it is rare to see something removed from the list, as most items continue to be important. Therefore, the list now appears to be never-ending. Instead of

creating lists, we should consider big projects together, to have more impact. We also need to determine how information is used by communities and the best ways to reach users. We need to ensure that the easiest way to get research findings into the hands of users is implemented. Additionally, in many cases, communities are drowning in data but lack the tools to make sense of their data and utilize it.

Philanthropy plays a structural role in society and research can facilitate this further. Notably, it includes information dissemination. Researchers need to be interpreters (to interpret how what is learned fits within an organization), and researchers need to participate in sense-making. It is important to take a broad perspective and look at the bigger picture.

Panel 2: How can the Ontario HUB support future sector priorities?

Facilitators: Manuel Litalien & François Brouard

Dr. Manuel Litalien (PhiLab/Nipissing University) and Dr. François Brouard (PhiLab/Carleton University), co-directors of PhiLab's Ontario Hub, made a short presentation on PhiLab and its current projects. They made comments on the newsletters, website, conferences, available funding, and student projects. They then opened the floor for discussion on the future of the PhiLab Ontario Hub including how the Hub can support their work, potential themes for monthly special editions, and the usefulness of regional conferences.

Some of the discussion reflections and highlights included:

- Is there a way to facilitate collaborations and partnerships, particularly as it relates to data collection and data base partnerships?
- Should there be dedicated research training capacity?
- Do the training and research functions strategically align?
- Can community foundations be the beneficiaries of training? They could be specifically targeted in this regard. This could include a large investment so training sessions would be meaningful. It would be worth collaborating with others (such as PFC or Imagine Canada). They may be based on demand rather than supply.
- How can research be distributed to the sector? What ways would it be meaningful?
- What role can PhiLab play in training the new generation of philanthropy researchers? Could PhiLab provide opportunities to practice various research methods? PhiLab's involvement in both projects and offering comprehensive training would be optimal.
- What is PhiLab's role in each region or on the national level? Is the current structure in various hubs too siloed (West, Atlantic, Ontario, Québec, Indigenous, International)? How can we further collaborate? Is it possible to create regional research networks?
- There is a critical mass of organizations that operate provincially resulting in a granularity of data.
- There is place to improve local/regional research and collaboration.

- PhiLab and its partners could rethink efficient modes of communication. Maybe a newsletter, weekly communication, a searchable archive? How about a Canada-wide news channel which could report on each region? Both national and regional communication can be encouraged.

- There appears to be a large appetite for collaboration, but we are still facing hurdles. Is this due to lack of researchers or students? Maybe we need more investment at the university level? Is this due to the lack of communication between PhiLab's various hubs and its grantmaking foundations partners? How can we make collaboration more spontaneous?
- How can we organize a knowledge space which is based on how users think?

Overall, there is a need for more communication between academics and foundations. Communication within PhiLab can provide opportunities to increase collaborations. There is the possibility for better communication on current projects, such as updates on the research project page. Maybe blog posts could be written on new projects.

Closing remarks: Peter R. Elson, Philab

Closing remarks were presented by Dr. Peter R. Elson (PhiLab/University of Victoria) and co-director of PhiLab. He began by acknowledging the indigenous territories, then thanked the conference's coordinators.

Dr. Elson noted some of the common themes from the conference. He remarked on the issue of capital and privilege, stemming from the inability to access capital by groups that are systematically excluded from the conversation. He asked if this could be related to who is at the decision-making table, who is involved with research, and who we engage with.

Dr. Elson identified the possibility of a shift taking place in philanthropy. He stated that there are two competing narratives. The first being, "*we want a new normal*", including specific changes to how we address problems. The second narrative is, "*I can't wait to get back to normal*". These narratives play out differently in a physical, structural, and political dimension. Although there is comfort in the nostalgic normal, we need to look at what is in front us.

Dr. Elson presented the idea of 360-degree funding or surround funding. This is accomplished when foundations can fund projects, organizations, community, and environment. Surround support is necessary for meaningful work to take place. The problem with only providing project funding is a time management issue, resulting in a starvation cycle. Organizations end up spinning in place, using a lot of energy not going anywhere. He stated this as a call out to funders.

He asked the audience several questions. Are we asking the right questions? Who is really benefiting from philanthropy? How can we address power inequities? If we really examine who we are, where will this take us? Are the right people asking the right questions? He noted that maybe it is the communities that need to be asking questions, and we (researchers and philanthropic representatives) need to genuinely listen. He emphasized the importance of relationship building and trust building, especially in Indigenous communities. He noted a need to build a different kind of relationship and ask if the money was worth receiving?

Dr. Elson concluded with identifying the importance of the power of stories and the need for self-reflection. He noted that all work should start with self-reflection. We need to ask what changes

we want to see, and before seeing changes, we must see ourselves and our own context. We need to ask, “how do you walk on the land?” and “what do you carry going forward?”

More information at:



Canadian Philanthropy Partnership Research Network
Réseau canadien de recherche partenariale sur la philanthropie

<https://philab.uqam.ca/>

Videos of the conference at:

<https://philab.uqam.ca/en/events/ontario-hub-regional-conference/>

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