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Historic trajectory of the Lucie and André Chagnon Foundation

Master Document

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Historical Trajectory of the Lucie and André Chagnon Foundation

Timeline 2000 to 2018: Master Document

Équipe PhiLab
Projet Fondation Lucie et André Chagnon

Jean-Marc Fontan (UQAM)
Taïeb Hafsi (HEC)
Juan-Luis Klein (UQAM)
Saouré Kouamé (University of Ottawa)
Sylvain Lefèvre (UQAM)
Benoît Lévesque (UQAM)
Juliette Rochman (CRISES)

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Introduction

Between 2000 and 2018, the Lucie and André Chagnon Foundation[1] (hereinafter "the Foundation") underwent profound changes. To study its historical evolution, our research team, composed of researchers from the Center for Research on Social Innovations (CRISES) and PhiLab, conducted two studies for the Foundation. The first, launched in 2011 and completed in 2012, focused on the period from 2000 to 2010.[2] The second study, conducted in 2018, covered the period from 2009 to 2018.[3]

Why conduct a historical study on the Foundation?

Two main motivations determined the research collaboration established in 2010 between our team and the Foundation's management, namely:

- Our team, specialized in the question of new forms of transformative social innovation, saw the study of the conditions of the emergence and development of this foundation as an important opportunity to generate new knowledge on a sector—grantmaking philanthropy—that had been under-researched and poorly known in Quebec at the time;

- The management of the Foundation considered it important to examine the factors underlying the ruptures and continuities that marked the history of their organization from a scientific perspective. In addition, they were under pressure to make this information available to the general public so as to be transparent regarding their organization's historical trajectory.

Both studies accomplished the shared goals we had set for ourselves. They were conducted collaboratively in the sense that we came to an initial agreement on the research mandate; the method to be used; the accessibility to the required documents and to the key people to be interviewed; the follow-up procedures; and the ensuing dissemination activities of the knowledge gained.

For each of the two main phases of our research work, we mobilized scientific documents or documents internal to the Foundation in order to gather and analyze relevant information. We also conducted semi-directed interviews with people affiliated with the Foundation or acting in its ecosystem of action. Each of the studies resulted in research papers, which we have compiled into two major appendices attached to this research report.

Appendix I: Timeline from 2000 to 2010

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[1] The mission of the Lucie and André Chagnon Foundation "is to prevent poverty by contributing to the educational success of young Quebecers (from conception until the age 17) by helping them develop their full potential. In order to fulfill this mission, we provide long-term support for organizations and associations that are working together to actively develop their capacity for sustainable initiatives aimed at promoting the educational success of all children living in Quebec." (https://www.fondationchagnon.org/en/who-we-are/mission-prevent-poverty-educational-success.aspx)

[2] The first mandate (2011–2012) was to achieve four objectives: contextualize the Foundation's emergence and development framework; systematize the achievements of the Foundation's first ten years of existence according to its major development periods; develop a strategic analysis of the first ten years of the Foundation; and identify avenues for action or positioning.

[3] The second mandate (2018) made it possible to complete the work of systematizing the philanthropic models deployed by the Foundation. It aimed at achieving three objectives: understand the Foundation's strategic repositioning, as conceptualized from 2015 on; situate this repositioning in relation to the societal situation in which it emerged; identify courses of action.

- o I A: Appendix I A describes major phases of the Foundation's evolution between 2000 and 2010.
- o I B: Appendix I B presents the Foundation's ecosystem for the first period studied.
- o I C: Appendix I C takes an analytical look at the first ten years of the Foundation. It identifies a number of findings and proposes scenarios for making strategic choices.

Appendix II: Timeline from 2009 to 2018

- o II A: Appendix II A looks at the period from 2009 to 2018.
- o II B: Appendix II B presents a summary of the contextual elements that had an influence on the more recent evolution of the Foundation.
- o II C: Appendix II C provides a detailed economic analysis for 2018.

This report

The purpose of this overall summary is to present a unified timeline of the Foundation's history. Figure 1 shows the key elements of this historical timeline that seemed most relevant to us.

In the first section of the summary, we present the history of the Foundation, namely based on the different philanthropic models which the Foundation had designed and deployed to guide its actions.

After presenting these main models, we discuss, in the second section, the elements of analysis that we had discerned from the first phase of this timeline. These constituted a reference framework for strategic choices to be made by the Foundation's management team from 2013 on.

In the third section, we complemented this initial analytical work with a prospective presentation of the possible evolution of the new philanthropic model that the Foundation deployed starting from 2017 and made operational from 2018.

Figure 1   Timeline of the Foundation – 2000 to 2018

Émergence d'éléments de critique sociale / intensification de la critique 2007 à 2011 / Énoncés ponctuels de critique jusqu'à 2018

FLAC :
communauté santé
130-140 plts
QEF

2002

QE
2005

Élargissement CA

Grpe Ménard
Fin prév. maladie
Visée Réussite éducative
Partenariat avec le gouv.

2006-2007
3 fonds
Naître et Grandir

Étude FLAC Phase I
Mise en place projets prometteurs
(CAR, AGORA, PIC)

2011
Appropriation

2013
Réseautage

Prise de conscience d'une déconnexion
avec les réseaux d'acteurs et volonté
d'établir un dialogue et de tirer des apprentissages

2014
Discussion du renouvellement de l'entente avec le gouv.

Positionnement FLAC
Austérisme gouv.

Allocation ponctuelle de transition concertation territoriale

Annonce du non renouvellement du partenariat gouv.

Prise de position
contre la rigueur budg.

Février
2015
Réseautage
Construction de positions collectives

Groupe des éclaireurs

Modification CA
Conception MBI

Tensions liées à la transition du modèle
philanthropique à deux niveaux
soutien direct + professionnalisation

Fermeture R2
2016

Nvl. orientation
Approbation CA en mars

Sept. 2016
JMC devient président de la FLAC

Discussion avec le MSSS
sur la récupération
des expériences des fonds:
politique de la prévention

2017

Analyse du processus
stratégique de la FLAC

Travail PFC
effet miroir

Développement de partenariats avec 13 territoires pilotes

Demande de clarification de la part
des fonds et des bénéficiaires
(décision concernant les fonds)

Réflexion sur modèle org.

Mai
clarification pr les fonds
choc:deuil- colère-déni (QEF)

Juin

Prés. Nvl struct.
aux employés

Recrutement chef transformation

Orientation
sept-17
V2.0

Présentation de C. Chagnon à l'Institut Mallet

ACFAS
Étude FLAC Phase II
Diag. org. Harléé (juin)

Juin 2017-mai 2018
Rencontres avec les org. Et rész.
présentation orientation

Listening tour sur *Mission based investment*
et l'investissement responsable

2018

Entrée fonction
VP PACO

Avril
Modalités rendues publiques de sélection
de projets

2019

Fin QEF, AE
& Fonds

2020

(1) Agir intuitif et directif
Thèmes : santé, pauvreté, petite enfance
mode d'agir: faire une différence
par le communautaire

(2) Agir partenarial fonctionnel
Thèmes : pauvreté & saines habitudes de vie & réussite éducative
& petite enfance
Mode d'agir: par les politiques publiques

(3) Agir soutenant et apprenant
Thèmes : Pauvreté & Réussite éducative
Mode d'agir: position modeste sur sa capacité transformative de la société ; transformation de l'organisation interne est exigeante, approche de travailler « avec » les autres acteurs

Questionnement "chaotique" sur l'avenir

1.0   The Foundation's four models of philanthropic action (2000 to 2018)

The elements of analysis that emerge from the Foundation's history allow us to identify four models of philanthropic action. Each of the models generated achievements, learnings and specific questions. These mobilized a diversity of resources, drew from different forms of innovation, sparked successive waves of social criticism, and established major elements of continuity and discontinuity.

In order to qualify these philanthropic models, with the exception of the first model that already existed prior to the creation of the Foundation, we apply the following three dimensions of analysis:
* the relation to legitimacy;
* the relation to social efficiency and its differentiation in terms of coherence with the philanthropic purpose of the organization;
* the relation to the Foundation's integration, as a social actor, in Quebec society.

Figure 2:   Historical trajectory of the Foundation
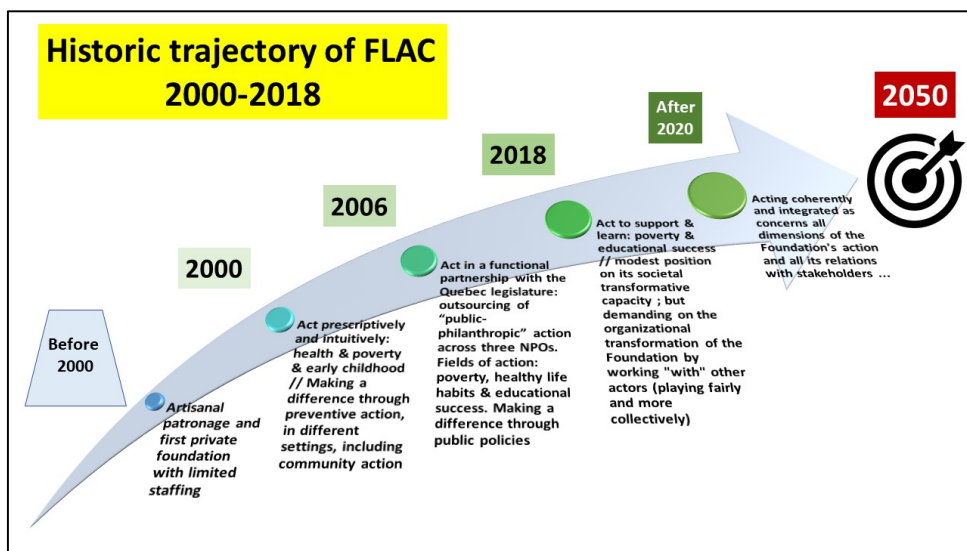
1.1   Before 2000: The Chagnon family started out with basic philanthropic actions and with setting up the foundation

In the 1960s, the Chagnon family began becoming involved in "artisanal patronage" activities that led, in 1988, to the creation of the first foundation, the *Chagnon Foundation Trust.*

In 1999, the sale of *Vidéotron* allowed the family to bequeath 30% of the revenues generated by the transaction to the charitable organization "Lucie and André Chagnon Foundation," registered in 2000 with the Canada Revenue Agency.

An endowment of $1.4 billion was set aside for philanthropic activities that were yet to be defined. The financial scope of this endowment rendered it the largest private foundation on Canadian soil. The

announcement of the creation of the Foundation was, in general, well received in Quebec.

1.2 From 2000 to 2006: setting up of the "first philanthropic model" qualified as intuitive and prescriptive

Once the Foundation was incorporated, an approach, which had been worked out in consultation with informers, resulted in the formulation of a first strategic positioning. The latter materialized in and through a first philanthropic model that we considered to be intuitive and prescriptive. At the time, it was a question of responding to the family's desire to "make a difference" through preventive actions by working with various sectors of Quebec society, including the community. In addition to the consulting work, including the completion of a mission in the United States, the Foundation pursued reflections and insights that required going beyond the philanthropic intervention modalities of the previous period, characterized as weakly organized philanthropic action. This first major mobilization of knowledge resulted in a summary, a choice, two major fields of intervention (health and poverty), and a focus (early childhood).

This moment of formulation and deployment of the first philanthropic model corresponded to a relationship to social legitimacy that highlights strengths, including:
- the proposal to act only upstream, through prevention, was innovative;
- he proposal to specialize on the topic of early childhood was consistent with the desire to work preventively;
- the idea of acting on poverty and health had a strong social resonance.[4]

Although the Foundation's mission was deemed socially legitimate, its deployment presented weaknesses due to the adoption of a relational intervention strategy where the "prescriptive" component took precedence over listening and dialogue.

The prescriptive nature, perceived as even being "authoritarian," of their relationships with various sectors, including the community, made the Foundation's overall project lose legitimacy. It was during this phase that a first wave of social criticism, emanating from Quebec's community action circles, came to light regarding the "collaboration" methods used by the Foundation.

In 2002, a first collaboration with the Quebec government took place, which led to the creation of the *Québec en Forme* project. By at once supporting community-based projects and exploring another modality of intervention, through a partnership with a government department, the Foundation manifested for a first time its ability to simultaneously develop two lines of intervention (ambidextrous innovation). The staff mobilized by the Foundation grew from five in the year 2000 to 38 in 2002.

In terms of effectiveness, this first philanthropic model reflected the Foundation's positioning in a niche divided between a social dimension—poverty—on the one hand and a biomedical dimension—health—on the other. Yet the fact that the work on these two dimensions was done in silos strongly hindered the coherence of the actions of the Foundation. This consistency, we qualified as minimal, and this, because:

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[4] Note that in the late 1990s and early 2000s, several actions in civil society and in the National Assembly of Quebec focused on poverty issues, including the unanimous adoption of the *Act to combat poverty and social exclusion* (adopted on December 13, 2002).

- lack of expertise of the Foundation's management and staff in relation to the specific task of large-scale institutional philanthropy;
- silo work in the two major work sites that were deployed;
- lack of internal reflection and guidance on the "responsible investment" dimension to be given to the investment of the endowment in the financial markets.

Finally, the societal integration of the Foundation in the social development and health sectors was defined in a position from above (from 2000 to 2002), insofar as the Foundation was a "philanthropic actor" who had not yet shed his "entrepreneurial" reflexes and who did not yet perceive himself as a "social actor" having to cohabit and collaborate fully with other social actors.

After 2002, certain elements reflected the transformation process from "experienced entrepreneurial actor" to "first-generation philanthropic actor," including the creation of *Québec en Forme*, the high number of professionals hired, the impact of the Foundation's model on the health sector, and the repositioning of the Foundation's action around a major target—early prevention and overall child development—which resulted in the establishment of the working group platform *Québec Enfants,* which was managed by the Foundation in collaboration with local action committees.

1.3 From 2006 to 2015: the setting up, by the Foundation and the Quebec government, of a philanthropic model qualified as a "functional partnership"

Between 2005 and 2006, in consideration of the structuring effect of Québec en Forme and the relevance of the strategy based on the mobilization of local communities and of Quebec society (around educational success), and seeing the openness of the Liberal government to the establishment of partnerships between the public and private sectors, the Foundation broke with its first major strategy by investing in the implementation of a second model of action called "functional partnership."

This partnership model was defined jointly with representatives of three Quebec government departments. Based on this new approach, the Foundation's management decided to outsource most of its capacity to act. At the height of its development, from 2000 to 2009, the Foundation had nearly eighty employees. The implementation of the three agreements significantly reduced the number of Foundation employees, bringing the team of professionals to just under forty people in 2010. The major part of the public-philanthropic intervention resulting from the partnership was then assumed by three separate non-profit organizations (NPOs), including two funds and an agreement, namely:
- *Québec en Forme* and the *Fonds pour la promotion des saines habitudes de vie* (Fund for the promotion of healthy lifestyles), in partnership with the Quebec Department of Health and Social Services: resulting in a first agreement, from 2002 to 2007, and a partnership from 2007 to 2017;
- *Avenir d'enfants* and the *Fonds pour le développement des jeunes enfants* (Early childhood development fund), in partnership with the Quebec Department of Family and Senior Citizens: this partnership was established between 2009 and 2019 and resulted in the creation of a second NPO in 2009;
- *Réunir Réussir* and the partnership agreement signed with the Secrétariat à la jeunesse du Québec: this agreement was crafted between 2009 and 2015 and allowed for the creation of a third NPO in 2009.

The partnership model with the state suggested a new relationship to legitimacy. At the time it was, as was the intention, about ensuring a follow-up and monitoring of the three NPOs in place in order to learn from their actions and channel the Foundation's intervention, through the mobilization of local communities and Quebec society, toward adopting a mandate to be assumed collectively: educational success. For the Foundation, its legitimacy as perceived internally was based on the presumption that with a partnership mode of work it would be possible to demonstrate, to the departments concerned, the relevance of an "alternative way of doing things." This other way, through the learnings that emerged from the action of the three NPOs, would be demonstrative and have the potential to positively influence some of the existing or future public policies, or even the innovation capacity of the public authorities.

This working environment provoked, still in terms of social legitimacy, turbulences that questioned the relevance of the action targeted by the Foundation. In fact, the various sectors involved in setting up the three NPOs were not part of the negotiation that took place between the Foundation's management and representatives of the Quebec government. This caused tensions that took time to subside, especially in a broader context of criticism of public-private partnership (PPP) agreements. The "authoritarian" aspect of the Foundation's first model, although diluted in the second model, was somehow recomposed in a different form; as a result, it took some time before the three NPOs could operate in a more conciliatory mode. In addition, any post-agreement negotiation between the Foundation and the state was not continued after the establishment of the NPOs. Roles and responsibilities were poorly defined, and the statement and the understanding of a common vision among the partnerships were minimalist. Therefore, there was not necessarily a consensus between the two major partners regarding the meaning, scope and working arrangements of the three NPOs.

It was not until around 2014 that a real effort on optimization was undertaken—albeit not enough and too late. The results of this step were not conclusive.

The development of partnerships between the Foundation and the Quebec government gave rise to a second wave of social criticism. The basis of this new criticism broadened in terms of the diversity of voices that emerged, including the community setting, the labour community and opposition parties. Several media also relayed the criticisms that were advanced. Social criticism called into question in particular the idea of "private" agreements, developed in this case between the state and a foundation, without allowing for a public debate about the need, meaning, scope or purpose to be given to the envisaged partnership.

In terms of efficiency and development of the philanthropic profession, this period was rich in learnings since it allowed to continue the process of professionalization, the strengthening of networking and the structuring of the Foundation's ecosystem of intervention. This period also allowed the action strategy to be pursued through ambidextrous innovation insofar as a very small portion of the funds available to the Foundation were reserved for supporting so-called special projects that were not related to the three NPOs. On this point, let us mention the key role assumed by the Foundation, together with *Centraide of Greater Montreal*, in the conceptualization and implementation of the *Collective Impact Project* (CIP) in Montreal.

The interventions of the three NPOs led to a sectoral compartmentalization of public-philanthropic actions and reproduced the situation of the silo action that characterized the Foundation's first

intervention model. On this point, optimization attempts were initiated in 2009, between the Foundation and the three NPOs, to facilitate the decompartmentalization of interventions. The work carried out in silos by the NPOs subscribed, of course, to the model and rationale for action of the state; however, it did not allow for the level of coherence sought by the Foundation.

On the issue of how to invest the endowment, and despite the fact that the Foundation incurred significant financial losses as a result of the 2008 economic crisis, the investment department continued, in the name of financial profitability, to manage it in the financial markets in a traditional manner. Following a loss of just over $400 million in the aftermath of the global financial crisis of 2008, the portfolio was upgraded around 2010, bringing the endowment back to $1.5 billion and then to nearly $1.8 billion in 2016.

In terms of social inclusion, while the period from 2002 to 2006 had ensured the transition to a "philanthropic social actor" identity, the period from 2006 to 2015 diluted this identity because of the partnership with the Quebec legislature. This proximity to the legislature had positive effects in terms of resource mobilization and expertise, combining those of the Foundation, the departments concerned, the three NPOs, and the partners and organizations associated with them. It also had negative effects insofar as it did not allow to distinguish between the work carried out by these various actors. Therefore, at least starting in 2009, the real effects of the partnership prompted a questioning within the Foundation.

Although this issue emerged slowly in 2009, it became central in 2014 when the Liberal Party came to power. The desire of that administration to reduce the weight of public spending and set aside territorial consultation bodies posed significant problems not only for local communities but also for Quebec society. For a foundation that relied on decentralized and mobilizing local community actions, and that wanted to influence public policies so as to facilitate the prevention of poverty through educational success, the weight of the inconsistencies generated by its main partner was problematic and called the validity of the ongoing partnership into question.

This question of the relevance of the partnership was partially solved in 2014–2015, when the Foundation joined the group of Quebec foundations that took a public stance against the risks of the austerity measures deployed by the government.[5] Joint action took place that advocated public policies that would reduce rather than accentuate social inequalities. In that sense, the Foundation took a public stance that indicated a change of attitude.

Between 2006 and 2015, the gains drawn from the experience of partnerships with the Quebec government, the weight of social criticism, and internal dissatisfaction with the organization accentuated the process of transforming the Foundation's identity profile. These elements paved the way for a second process that would be able to gradually transform the Foundation, if carried to completion, from "a first-generation philanthropic actor" to "a second-generation philanthropic actor".

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[5] The letter produced by the collective of foundations grouped around the issue of social inequalities states: "We urge the government to guide its policy choices by the effects they have on social inequality, while responsibly managing public funds. We propose that the government adopt as one of the criteria for judging the merits of a particular reform that it reduces inequality or, at least, that it does not further increase it."
(https://www.fondationchagnon.org/en/news/2015/collectif_fondations_inegalites.aspx).

1.4 Starting in 2015: conceptualization of a new philanthropic model based on a strategy of "support and learning"

In the winter of 2015, the Foundation and the Quebec government agreed not to renew the partnerships that were coming to an end. The *Réunir Réussir* agreement thus came to an end in 2015, followed by *Québec en Forme* and *Avenir d'enfants* planned to end in 2019.

The Foundation's resources were quickly mobilized to ensure the transition between the second "functional partnership" model and a new model that had yet to be defined, and which had to consider the learnings stemming from the first two models of action and evolution.

The conceptualization phase commenced in the spring of 2015 and spanned over nearly two years. It sparked internal debates and engaged in a consultative process with representatives from different key sectors of Quebec society.[6] Note that the financial assets of the Foundation continued to grow during this period, from $1.8 billion in 2016 to $2 billion in 2018.

The main outputs of this phase were:
- *The* Foundation's vision was strengthened: "Our vision of Quebec is that of a supportive, equitable and inclusive society that enables every child and every family to realize their full potential and play an active role in society."
- The intentionality of the mission was clarified: "By 'educational success' we mean the development of every child's full potential (physical, psychological, cognitive, social and emotional) throughout their young lives, helping them to grow into adults that are educated, qualified and socially skilled";
- Senior management and governance arrangements deepened the process of the organization's professionalization, including:
  - At the senior management level, André Chagnon became chairman of the board, Claude Chagnon was appointed vice-president and chief executive officer, and Jean-Marc Chouinard became president of the Foundation;
  - At the governance level, a more diversified representation was introduced;
  - At the management level, a major reorganization took place that aimed at reducing decision-making levels.

The new model of governance, although still marked by the influence of the donor family, who became a minority on the board of directors, engaged in a concerted effort to recruit representatives from a variety of backgrounds, including community and school communities, as board members. The governance arrangements also benefited from a strong professional presence and a decentralized decision-making approach in order to supply the operational level with more decision-making power. The role of the board of directors was reduced to the challenges of defining the main orientations and validating the major strategic actions to be carried out.

The first phase of the new philanthropic program was launched in the spring of 2018 and is expected to be fully operational by 2020 in order to:
- make the Foundation's actions consistent in all its dimensions of intervention, from the

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[6] On this consultation: https://fondationchagnon.org/en/news/2017/meetings_new_orientations.aspx.

investment of the endowment on the markets to the allocation of grants and the operational modalities;

- support partners through collaboration agreements in the short and medium term (from 5 to 10 years), as a means to support through initiatives or collective approaches based on projects qualified as structuring and as not coming from services offered to the general public.

The new model is based on a position of listening where the collaborative relationship is based on cooperation with so-called partner organizations. It is anticipated that the active listening and collaborative work will translate into learnings for the Foundation and its partners. The duration of project support will be determined from the outset and can conceivably range between a medium term of five to ten years. The point is to support collective initiatives around three main areas of intervention, these being territories, networks and resources. Some projects may be at the crossroads of two or even three identified areas. The challenge is also to move beyond a "wall-to-wall" logic and to, on the contrary, work with organizations from "where they are," both in their organizational development and with the specificities of their context and their territory.

Finally, for the first time the new model responds concretely to the question of the consistency to be established between "the investment strategy of the Foundation's endowment in the financial markets" and "the mission of the organization." This reflection/action resulted in the desire, in 2017, to reserve 10% of the endowment's capital,[7] or $200 million, for investments to be related to the mission. It also resulted in an ongoing study analyzing the investments that are made in the financial markets in order to determine whether or not they comply with the general criteria of responsible financing.

In terms of legitimacy, for the Foundation, the new philanthropic model incorporated many of the social criticisms that had been stated so far.[8]

- The position is one of listening and mobilization in order to support partners in the actions that they themselves orchestrate. The presentation of the new orientations was very well received, in substance and in form, including by actors who had hitherto been skeptical of the Foundation.[9]
- The aim was no longer to impose accountability or impact assessment procedures but rather to act in keeping with a learning approach based on trust. The evaluative function, for its part, did not disappear but was merely assumed by the funded partners, who were called upon to manage this function in relation to what they deemed necessary and relevant to evaluate.
- The Foundation intended neither to engage in the field of "public services" nor to replace the responsibilities and duties that are the responsibility of the state.
- We observe a real willingness to make the actions and mission of the Foundation coherent, including on the issue of investments in the capital markets.

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[7] Reserving 10% of the heritage fund that is available to the Foundation represents a significant step forward compared to the practices observed in the sector.

[8] Both the first model of intervention of the Foundation, divided between development actions of this philanthropic organization and a *will to act in an intuitive and prescriptive way*, and the second model, which revolved around the functional partnership with the Quebec legislature, generated positive, neutral or mixed results. The studies we conducted were not intended to assess the impact of the Foundation's actions. On this point, different points of view have been expressed that point to a good level of satisfaction yet also a clear dissatisfaction or opposition.

[9] "According to a survey conducted by the firm *Ad hoc recherche* in May 2018, the vast majority of 240 leaders from all walks of Quebec society who participated consider that the Chagnon Foundation is moving in the right direction with its new orientations." (Our translation; French only:
https://fondationchagnon.org/fr/actualites/2018/sondage_perception_fondation_chagnon.aspx).

However, despite the Foundation's announcement to withdraw from partnership agreements with the Quebec legislature, social criticism has not necessarily weakened since 2015. For one, over the last three years, critical elements have reappeared:

- in connection with the issue of tax optimization and avoidance, particularly related to the creation of private foundations;
- on the issue of the performativity of the partnership that was established between the Foundation and the Quebec legislature, which was deemed weak by the *Institut de recherche et d'informations socioéconomiques* (IRIS)[10];
- or, following concerns raised by the Quebec branch of the Industrial Workers of the World union about community working conditions, suggesting that funding provided by grantmaking foundations for projects funded by community organizations does not allow for access to decent wages.

Over time, the Foundation became Quebec's poster child of what institutional philanthropy should *not* be. In other words, any critique lodged against the philanthropic sector found in the Chagnon Foundation *the* symbolic representative to denounce or label in order to illustrate the cause!

In terms of effectiveness, the Foundation believes that its new model, based on an internal reorganization of the various functions to be assumed by the professional team, on the identification of new administrative directorates, and on the implementation of coordination mechanisms in support of learning and decision-making related to the allocation of donations, will make the organization more efficient and more coherent. Moreover, in the deployment of the current philanthropic model, the 2020 horizon is the target which the Foundation set itself for completing its break-in period. Yet, insofar as the conceptualization and operationalization has just recently been finalized, the new model needs to be tested.[11] It is therefore too soon to have a definitive opinion on the positive or negative aspects of the new formula.

This new "proposal and position" of the Foundation is both stimulating and ambitious. They reflect a societal integration that is much better defined and affirmed. The willingness to work together with other social actors reflects a desire to share. The Foundation's role as a social actor is more assumed, clearly promoted and better recognized by representatives of different key sectors of Quebec society. This role of social actor in its own right requires improvement, as evidenced by our identification of areas in the conceptualization of the new model that are less well defined.

We termed these areas that need to be further explained by either clarifications or by the break-in of the new model "black boxes." We grouped them into five themes, which we will present in the third section of this summary.

1.5   Blind spots and "black boxes" of the Foundation's new model of action

1.5.1 Theoretical blind spots

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[10] See the report produced by IRIS:
https://cdn.irisrecherche. qc.ca/uploads/publication/file/Note_FLAC_WEB_02.pdf.
[11] A survey conducted by the firm Ad hoc recherche shows a favourable reception among respondents from different sectors: community, government, university and philanthropic. For the survey results, see:
https://fondationchagnon.org/fr/actualites/2018/sondage_perception_fondation_chagnon.aspx.

The Foundation's new model is part of a context of identity affirmation in which its role, place and function in the social and political sphere are affirmed, revealing the maturity of the meaning given to its "philanthropic institutional action." The latter is no longer part of a rigid, partnership rationale, be it institutional regarding the state or transactional with the groups. It reaffirms the specific place and role of the state but places its intervention in a space of intermediation. It is about working "with" other actors, in collaboration, by defining itself as a social actor in its own right.

This position of social actor requires to consider the evolution of the societal situation in order to properly calibrate its role and place on the chessboard of social action. Why is it crucial for a social actor to have a good analysis of the situation in order to avoid the presence of blind spots in the structuring of its field of action? For two reasons.

First, while the new reflective[12] developments within the institutional philanthropic sector point to the development of a philanthropic theory and a consideration of this theorization in the development of action strategies, it is important to link this theoretical work to the scientific paradigms focusing on the transformation of societies, including:

- Theories that offer clarification on contemporary transformations of voluntary action and collective action [13], which aim to explain the evolutions observed both at the institutional and organizational levels and at the level of informal action.
- Theories that offer a systemic and sometimes critical point of view on the evolution of societies[14] in order to inform the positions to be adopted for guiding their future development.

The two elements are to be articulated: how might we act collectively today in a context of weakening liberal democracies (e.g., low voter turnout, loss of legitimacy of intermediary bodies, crisis of the media); of the radicalization of political withdrawal in the United States as in Europe; of social and territorial polarization; of a collapse of biodiversity; or of rapid energy transition?

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[12] On the new golden age of philanthropy, see: Ferris, J.M. (2016), "Is this a new golden age of philanthropy? An assessment of the changing landscape," *Voluntary Sector Review*, *7*(3), 315-324, DOI: 10.1332/204080516X14722016138829. On the question of the link between "major systemic changes" and "institutional philanthropic action," see: http://guerrillafoundation.org/tag/systems-change/. On the importance of developing a philanthropic theory, see: Patton, M. Q., Foote, N.l, and Radner, J. (2015), "A Foundation's Theory of Philanthropy: What It Is, What It Provides, How to Do It," *The Foundation Review*,*7*(4), Article 4. DOI: https://doi.org/10.9707/1944-5660.1263. On how to address systemic change for grantmaking foundations, see: Jordan et al. (2017), *Funding System Change: Challenges and Opportunities*, Toronto, Social innovation Exchange, Social Innovation Generation, Forum from the Future & The Systems Studio. On the proposal to develop an ecosystem approach to data management to better act on collective impacts, see: Cave, J., Gyateng, T., Lalande, L. and T. Lumley (2018), *Collaborating for Greater Impact: Building an Integrated Data Ecosystem*, Toronto, Enabling Environment, Mowat, NFP & NPC.

[13] As an indication, and for an overview of different models of social action, see: Bulle, N. (2005). "L'explication de l'action sociale," *Année sociologique,* Presses Universitaires de France, *55* (1), p. 9–18. <halshs-00137187>;>. For an introductory portrait of collective action, see the summary presented by Neveu: https://journals.openedition.org/lectures/16801.

[14] For information, see the texts and books of: Guidi, A. (2002), "Modelling the Social Evolution: The State of Art," *Archeologia e Calcolatori*, *13*, p. 65–78; Ronfeldt, D. (1996), "Tribes, Institutions, Markets, Networks: A Framework about Societal Evolution," Santa Monica, Rand; Le Moigne, J. L. (2006), *La théorie du système général, théorie de la modélisation*, Collection Les classiques du Réseau intelligence de la complexité; De Sousa Santos, B. (2016), *Épistémologies du Sud. Mouvements citoyens et polémique sur la science,* Paris: Desclée de Brouwer (éd.); Acosta, A. (2014), *Le Buen Vivir, pour imaginer d'autres mondes*, Montreal, Éditions Utopia; Beaud, M. (1997), *Le basculement du monde. De la terre, des hommes et du capitalisme*, Paris, La Découverte; Raskin, P. et al. (2002), *Great Transition. The Promise and Lure of the Times Ahead*, Boston, Stockholm Environmental Institute; Dardot, P. and Laval, C. (2014), *Commun. Essai sur la révolution au XXIe siècle*, Paris, La Découverte.

In the realization of such reflexive exercises, is is also advisable to adopt a praxeological position where it is less a question of developing a theoretical reflection for the purpose of theorizing than of closely linking the universe comprised of social imaginaries and critical reflection to the concrete material conditions in which this reflexive work is inscribed.

In the following figure, we present a possible articulation between the different theoretical reflexive spaces that support or are nourished by the developmental action initiated by social actors, including the institutional philanthropic actor. The worlds of reflection and action form a deeply interrelated whole.

Figure 3   Map of paradigms to mobilize in order to analyze philanthropic action
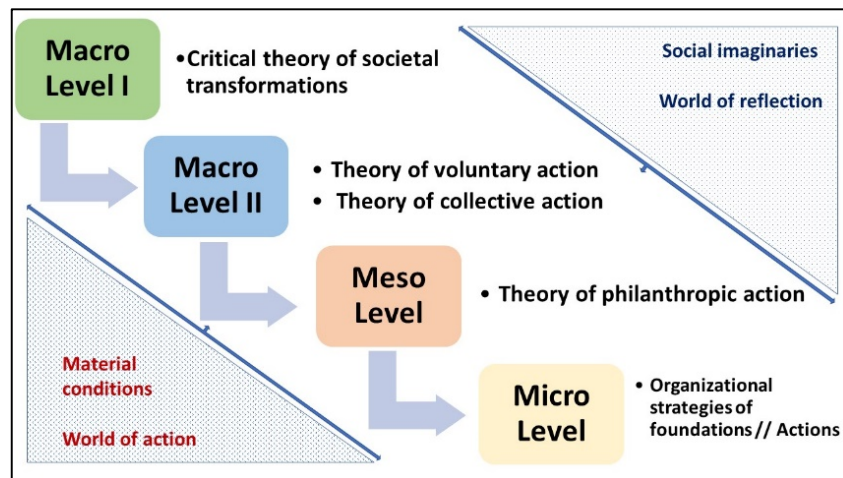
1.5.2 Black boxes

The presentation of the Foundation's new intervention model presents intentions, states principles and enumerates concepts or slogans, which are at times mentioned without being well defined. We use the image of a black box to illustrate the use of a terminology whose role is central and driving but which deserves to be better operationalized and which will require clear choices and arbitrations. These black boxes constitute spaces to work on in order to improve the scope and clarity of the model of action proposed by the Foundation.

I   A learning organization

Overall, one of the pillars of the new strategy is the proposal to turn the Foundation into a "learning organization." While the idea is attractive, it remains to be defined what the Foundation's team understands by "learning organization," or at least to situate this concept in connection with theoretical corpus that defines this notion.

It is therefore important to delineate the intended learning space within the ecosystem of action deployed by and in the new strategy. In other words, is this space limited to the organization represented by the Foundation? Does it extend to other stakeholder organizations in the ecosystem put in place by the Foundation? Or, does the Foundation learn from its own experiences or those of others? Finally, the point is to make this proposal operational and concrete by indicating how this learning will

take place and especially what purposes it will serve. In short, a learning organization by whom, for whom, with whom and why?

II and III   Collective action and relational action

The notion of collective action—in the sense of "we provide long-term support for organizations and associations that are working together to actively develop their capacity for sustainable initiatives aimed at promoting the educational success of all children living in Quebec" (from the Foundation's mission statement)—is mobilized to qualify the initiatives with which the Foundation intends to establish "relationships based on cooperation, mutual respect and trust," one of the three guiding principles identified by the Foundation.

The Foundation's use of the concept of collective action suggests that it intends to limit its primary focus to the general framework defined of the Canada Revenue Agency and that it will not engage in the support of actions realized by "non-collective actors," in the sense of public or private actors.

- This clarification makes it possible to make a clear and distinct break with the previous partnership strategy that had been initiated with the Quebec legislature in 2002 and developed between 2005 and 2015. But it does not offer the same clarity with regard to private actors.
    - o   On this point, does the fact that the Foundation signalled its intention to work with collective actors mean that it might also favourably support organizations or companies operating in the social or solidarity economy sector?
    - o   Could this intention become so determining as to orient the direction to give to the Foundation's investment policy?

While the segment of the population targeted by the Foundation's mission is well defined, the relational action that was evoked to deal with representatives of the collective actions to support is deemed as "partnership-oriented." The Foundation therefore intends to financially support collective actions as a "partner" in the actions supported. While the intention there is clear, noble and commendable, it raises questions about the nature and scope of the anticipated partnership and hence about the management of the relations of power.

- The fact that initiatives are financed is based on an unequal power relationship, insofar as the funder and funded are not initially in the same position of power.
    - o   One has an offer and a financing capacity.
    - o   The other has a request and a capacity of action management to undertake and calls for the requested financial assistance.
- The terms of the transaction are therefore uneven and initially act in favour of the funder.

The financial dimension itself creates an unequal status between the stakeholders, where the Foundation retains the power to decide as of when, under what conditions, for what amount and for how long financial support will be granted to a collective action that will become, once the contract is established, a "partner" in the action.

On this last point, few elements are presented to qualify the meaning to be given to a relationship that must be established in *cooperation, mutual respect and trust.*
- What will the framework and scope of the cooperation be?
- What will the roles and responsibilities of the stakeholders as well as the possibilities to be

considered and the limits not to be exceeded be?
- How will the terms of the agreement be established and negotiated with mutual respect?
- What will the reciprocity in the relationship be?

IV   Philanthropic role of the Foundation

Viewed from another angle, the principle of offering *support for organizations and associations that are working together to actively develop their capacity for sustainable initiatives aimed at promoting the educational success of all children living in Quebec* raises the question of the nature of the relationship to be established with organizations other than those financially supported to carry out the Foundation's mission.

By establishing relationships, in the form of agreements or contracts, the Foundation develops its ecosystem of action within other existing ecosystems, including that of the Quebec and Canadian philanthropic system.

At the current stage of defining and deploying the Foundation's new model of action, we do not have many indications of:
- how the Foundation intends to consider the funding ecosystem of organizations and clusters, and work with other stakeholders in the Quebec philanthropic system, on the one hand, and the Canadian system, on the other;
- the role that the Foundation intends to play in the identity and organizational development of this system.

So far, the new model focuses on the elements that are at the centre of the philanthropic system (see figure below). This makes it possible to clarify the nature of the links to be established between the following constituents:
- the donors: the Chagnon Family;
- the Foundation: the operational vehicle for managing staffing and interventions;
- the organizations: in the case of the Foundation, these are collective actions called "partners";
- the beneficiaries: young Quebeckers, as regards their educational success.

However, although the Foundation was active with other stakeholders in this system, little is said and presented about these other roles and functions that the Foundation intends to play as a social actor in general and as a philanthropic actor in particular.

Precisions would be needed to clarify the type of relationship that the Foundation intends to build with the state, and with municipalities, in order to achieve the clearly identified purpose of influencing public policies related to family, education and poverty. Again, clarification is to be provided.
- Do we intend to act solely by delegation and indirect effect? That is, through the financial assistance provided to the collective actions that are supported financially?
- Do we intend to go beyond the operational limits of delegated action and indirect effect?
  o If yes, how?
  o If no, why?

Very specifically on the actions to undertake in order to act on "poverty" (and not on social

inequalities) more than on the two other dimensions (family and education), the state is certainly a key player regarding that which relates to measures of redistribution of wealth. But the institutional field of the "market economy" is central in terms of the measures of the conditions of production and distribution of wealth and the dynamics of inequality and social mobility (e.g., working conditions, housing, transport, relationship with the territory, governance arrangements, ecology/environment).

Figure 4:   Ecosystem of philanthropic action
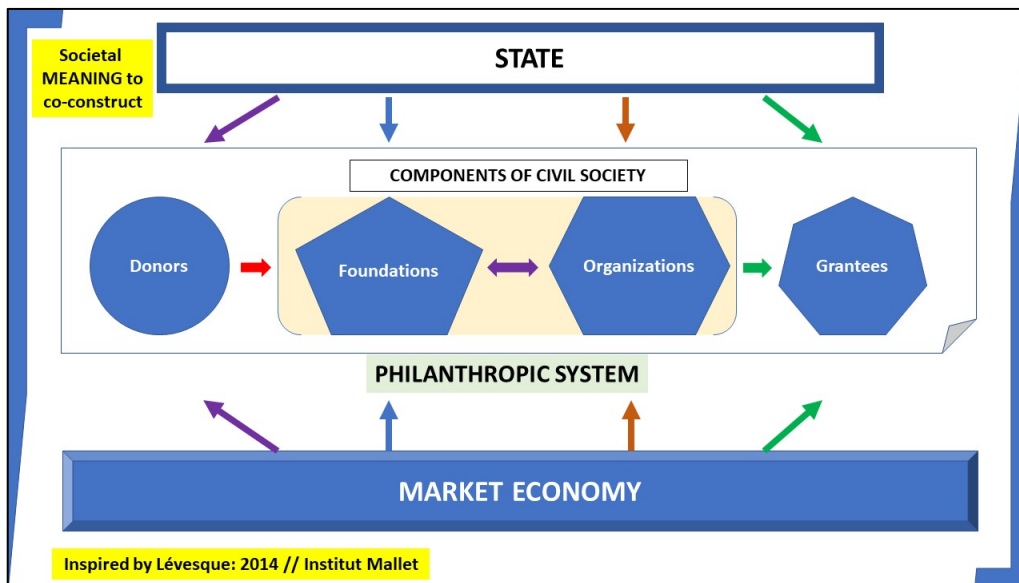
Finally, the Foundation's action participates "in the societal meaning given to philanthropic action." Again, although from the outside this function appears implicit in its mission, little is said about how the Foundation intends to clarify this question. However, it is crucial on the basis of the Foundation's "objective" role (e.g., importance of assets, visibility) as well as its "subjective" role (target of social criticism on philanthropy for some, model to follow for others).

Beyond the responsibility of a foundation to clearly and transparently define the framework of its intervention (its model of action), there is also a collective responsibility specific to philanthropic actors to clarify the meaning and scope of their actions in relation to the two major fields of intervention developed by the state and the market. It is important to take a stand within the third broad institutional field represented by civil society, which remains very heterogeneous, fragmented between different components or families and poorly organized.

V   Coherence and cohesion between the vision and the actions of the Foundation

The issue of coherence and cohesion needs to be considered in their external and internal dimensions, that is to say, both in the internal management of the organization and in its ways of behaving within the system specific to its area of intervention.

At the definitional level, we hold that coherence calls for a reduction in the gap between the identity that an organization gives itself and the output generated in the action. It is certainly difficult to act in a perfect coherence between "the desired and the obtained goal." It is both normal and healthy that a

functional gap is present; yet it is harmful to generate an excessively large coherence deficit. The organization then loses its legitimacy, both internally and externally.

Pech Várguez[15] proposes a definition of coherence that situates the latter in terms of the coordination of an organization's activities and in which, according to him, cohesion concerns the quality of the internal and external stakeholders' identification with the project.

- Ensure, through clear leadership, a unifying and shared internal and external coordination of activities—starting from clearly defined roles and functions and responsibilities that are well-defined and adequately resourced—enables constituents and mobilized individuals to generate an excellent match between the projected identity and the identity generated by and in the action.
- Making sure that the identity of the project is clear in terms of the ideal, the aspirations and the realization of a collective self, both internally and externally, and allows for the creation of a cooperative climate that reduces uncertainty and confusion among stakeholders.

The less institutional distance there is between, on the one hand, the ethics, the aesthetics and the normative aspect of an organizational project and, on the other hand, the direct and indirect actions that it realizes or spurs, the higher the levels of coherence and cohesion.

For the Foundation, the black boxes identified are all elements that need to be worked on—in order to generate "collective" meaning so as to create the conditions required to reduce the institutional gap between the project and the expected effects.

For the Foundation, the nature of the relationship between the mission it promotes and the effects targeted and expected by the actions initiated is directly related to the sector of intervention of which it is a part (philanthropy) and the quality of the device that it deploys, namely a model of action proposed and put forward.

This brings up the presence of two large fields of work.

First, in a direct and indirect way, the Foundation updates or stages what "philanthropy" means, while relying on this specificity to generate organizational coherence and cohesion.

- The Foundation therefore has an identification responsibility, shared with others, to clarify what "philanthropy" means for itself as well as the meaning to be given to the existence of this institutional field of action and reflection. It is then a question of making explicit and implicit the meaning to be given to this notion in order to clarify its place and scope in society.
- In doing so, a horizon could be created jointly, both in the image of the actor guiding the action of the state (that of regulating in the name of the public good) and of the actor defining the purpose of the market (that of generating wealth through economic activity.)
    - o What is the meaning and shape of this horizon for the philanthropic sector?
    - o Can this horizon be defined simply as the search for the common good and the notion of *buen vivir*?

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[15] Pech Várguez, Luis J. (2003), *Cohérence et cohésion de l'équipe de direction dans la petite et moyenne entreprise: le cas des hôtels familiaux au Yucatan. Gestion et management.* HEC PARIS. <NNT: 2004EHEC001>. <pastel-00918649>. (https://pastel.archives-ouvertes.fr/file/index/docid/918649/filename/2004_EHEC_0001.pdf.

Secondly, depending on the collective capacity to define and understand philanthropic action, a second major work stage falls to the Foundation in the form of a singular intervention proposal. This unique proposal is to be deployed in action models, including the present working model.

2.0 Summary elements and courses of action identified for the first period studied (2000 to 2010)

2.1 Summary

Four main lines of reflection, questions or challenges emerge from the first historical period of the Foundation (2000 to 2010).

First, with respect to the legitimacy of action of a philanthropic organization, the fundamental contradiction faced by any private grantmaking foundation is that it must work from private financial capital accumulated on the basis of a collectivized work carried out within a company or an organized system of enterprises. The result is a limited legitimacy where, in theory, the accumulated surplus should, according to a socially acceptable ratio, be redistributed to an entity with social legitimacy in this area, in this case, the state.

However, in the current legislative situation this is not the way things work. The Canadian state allows for funds comprised of "so-called social capital" to be exempted of taxes if a prescribed part of the surplus is actually used for social purposes. Nevertheless, the governance of this operation remains "private." To "collectivize" this management, it would be, at the least, necessary to ensure a shared or collectivized management of decisions concerning it.

Although the Foundation's management follows this line of thought, the question of the governance arrangements to be adopted arises. Beyond the rules relating to the composition of its board of directors, where measures have already been put in place to ensure a majority presence of members who are not from the Chagnon family, what other management methods could be implemented in order to include other voices or points of view? Should we go further than the criteria already in place to designate the members of the board of directors?

Secondly, in the face of the relation to the state, the development of partnership agreements with the latter raises the issue of a possible devouring of the rationale guiding philanthropic action by the rationale guiding public action. This raises the question of how to devise this alignment. What is the best way for David to work with Goliath without losing his identity?

Thirdly, at the level of civil society there is a third challenge, that of the strategy of thinking and living collaboratively so as to implement organizational devices that are coherent and well adapted to the achievement of a "philanthropic value" that would be based on the achievement of "the common good and the public interest." How might this philanthropic value be defined? And what systemic strategy—in the form of new institutional and organizational arrangements—should be adopted to achieve the expected results?

Finally, fourthly, at the purely organizational level of the Foundation and as a result of the elements relating to the work carried out between 2000 and 2010 as well as to the networking developed in the community and institutional sectors (including the public sector), to the resources mobilized, the experience gained, the understanding of the difficulties and, finally, the changes in the situation and the institutional framework of Quebec society, we then raised the question of whether the Foundation's management was using the learnings or lessons that emerged from its first decade of existence.

In our understanding, the Foundation has not made full use of the learnings and innovative processes that have been put in place.

With regard to learnings and processes, it was clear that they showed the importance of being well informed about the internal reality of the organization and the evolution and transformation of the external reality.

- The Foundation would do well to develop tools to conduct analyses, both internally and externally.
- The Foundation would also do well to make decisions that are better supported and more anchored in the expertise of partners or allies with whom it works and the learnings that emerge from the experiments that it has implemented.

To do this, it is necessary to:

- have time and not be tempted to take rapid actions that, depending on their nature, can have long-term and severe consequences when they do not go in the expected direction;
- re-examine the question of knowledge and reflect on the Foundation's position in relation to that knowledge.

Not only has the Foundation produced new knowledge but it has changed its relationship with this knowledge by becoming an expert organization in its field. This ensures that it has the opportunity to define its action strategy not only with regard to existing knowledge but also with regard to the knowledge it would like to see emerge, giving full meaning to the terms "experimentation" and "innovative organization."

2.2 Action tracks we identified in 2012

We identified three work scenarios that presented themselves as successive stages depending on the decisions to be made by the Foundation's management. For each scenario, we presented changes or innovations that could be introduced. Contributions are applied or not from one scenario to another depending on the decisions made.

Scenario I

The first scenario had the advantage of maintaining a continuity of action vis-à-vis the decisions that led to the conclusion of the three partnerships. There was no break but continuity prevailed. With little risk in the short term, this scenario required great vigilance in the medium and long term in order to not be endorsed by the rationale behind the action of the state apparatus.

However, the maintenance of partnerships with the state would have benefitted from considering some

of the learnings identified in the analysis of the historical period. It would be possible to make minor and major changes that would have an impact on these partnerships. Among the examples of changes that could have been made at that point were:

- a review of the composition of the board of directors of the Foundation and of NPOs, so as to be more in line with the idea of working from the public interest and common good point of view by being more representative of the systems of actors concerned by actions developed in the field;
- the establishment of an internal think-tank on social investments accomplished to date and the Foundation's organizational strategy;
- clarification of the common objectives of the Foundation and the departments responsible for the three partnerships;
- greater synergy and pooling of services between the three NPOs, namely:
  - o the possibility of setting up a community of practice for each of the two major themes: healthy living habits and poverty;
  - o development of common structures between NPOs;
  - o the use of common tools;
- bringing the Foundation into dialogue with representatives of the major sectors of the Quebec development model, and finally;
- the development of a media kit on this first phase of the Foundation's history aimed at rendering the organization's decision-making and information more transparent to the internal and external population.

Scenario II

Scenario II was based on a major reconfiguration of the partnership strategy. The risks were a little higher in the short term but were to ensure a distancing on the part of the Foundation from the partnership agreements concluded with the state. Without abandoning the idea of partnerships, the aim was to reconsider the nature, type and duration of the partnerships according to more defined objectives.

This second scenario repeated some of the previous elements by adding new dimensions, namely:

- an assessment of the ongoing partnership with the state;
- an assessment of the work processes and impacts of the three NPOs;
- exploration of new partnerships with civil society organizations, other foundations or private organizations, and that would allow pursuing the following avenues:
  - o the Foundation and a sector of community action (private partnership-civil society);
  - o the Foundation and the state (private-public partnership) according to the following definitions:
    - ▪ the Foundation, the state and a sector of community action (partnership private-public−community action);
    - ▪ variant 1: governance under the jurisdiction of the Foundation (possible);
    - ▪ variant 2: governance under state control (possible);
    - ▪ variant 3: governance under the leadership of the community sector (unlikely)
    - ▪ variant 4: collective governance based on strong leadership exercised jointly

between the Foundation and the community sector; an option that promotes balance and distinguishes the institutional from the organizational (desirable);

- clarification of the time horizon of capital available to the Foundation's management;
- clarification of the "philanthropic value" to be achieved;
- deployment of a plural partnership strategy based on these clarifications, namely:
  - with the state in the form of a big partnership based on new foundations or on the basis of the current improved model;
  - with other civil society organizations (new model to be conceived);
- the development of a project that would be carried by the Foundation and taking into consideration the idea of exercising an "influence" (work model to be conceived).

Scenario III

Scenario III is the most radical of the three scenarios. The risks were high in the short term, but this option would have provided a medium and long-term clarification of what the Foundation wanted to accomplish as a "societal project." In the short term, the Foundation would have circled back to uncertainty. However, this option would have allowed for a complete upgrade of the organizational strategy.

This third scenario was based on "the blank page" concept and proposed to reconnect with radical innovation. It would then be a question of considering all the options, including refocusing the mission and vision and identifying the Foundation's contribution to what the to-be-achieved "philanthropic value" might represent; in other words, to clarify what the Foundation can actually do to fight against poverty.

It would be a question of considering the resources available to the Foundation, by adopting a pragmatic, critical, patient and modest approach, and by working in partnership, alliance or consultation with other actors while aiming for transparency and more organizational democracy in its interventions. To move in this direction, the Foundation could act on the basis of ambidextrous innovation and give itself a dual mandate, namely:

1. improve the current organizational structure starting from scenario I or II;
2. explore a new intervention strategy, which would remain to be conceptualized.

To realize the latter, we considered that it was necessary to proceed with:

- a strategic planning exercise that would consider:
  - learnings, lessons and expertise developed by the Foundation during the years 2000 to 2010;
  - issues posed by the current economic situation and the nature of the transformations taking place at the institutional and organizational levels of Quebec society. This would suggest:
    - a revised mission and vision;
    - clearly identified objectives to be achieved;
    - a reconfiguration of the organizational structure:
      - internally: definition of core activities and projects;
      - externally: definition of activities, projects and structures to be outsourced

- Establishment of three working groups, including:
  - a "strategy" team of about four people within the Foundation (for information purposes only);
  - an advisory committee made up of representatives of the society, including two people from the Foundation, two university representatives, a key civil society person, a key public figure, a business person and a person representing citizens (i.e., a normal or average citizen);
  - a research team to support the work of the advisory committee in pursuing research activities conducted by:
    - academics;
    - consultants.

3.0　Avenues of action emerging from the second period studied (2009 to 2018)

3.1　Reactions to the models of the first studied period

The Foundation's second intervention model, established on the basis of a partnership with the Quebec legislature and based on a delegation of philanthropic action to independent third-party organizations, elicited four major reactions that favoured the abandonment of this model of action.

First, as early as 2002, the rise in social criticism that accompanied the deployment of the Foundation's first model of action was reinforced during the transition to the second model. The partnership with the state, which was then considered by the Foundation's managers as a winning option, was counter-productive in terms of its social acceptability.

This social criticism alone would have had a limited effect if it had not resonated within the partnership system set up. Both the Foundation and the three separate NPOs that were created—*Québec en Forme*, *Avenir d'enfants* and *Réunir Réussir*—reported dissatisfaction and unease that could not be positively resolved.

Second, the Foundation's challenge to influence, through this partnership approach, the state's ability to act through mutual learnings that would result from the joint action conducted with the three NPOs also proved to be less convincing than hoped.
- On the one hand, the partnership system took a long time to set up. In addition, it quickly became complex without proceeding in an integrated way to maximize collective impacts.
- On the other hand, the gains stemming from its establishment and the actions that were supported did not necessarily translate, for the Quebec legislature, into clear learnings that could influence the development of new public policies or the improvement of existing ones.

Thirdly, the partnership model placed the Foundation in a position of "fiduciary actor of the interventions deployed by the three NPOs." The reason of being of the Foundation was limited to the central role of being an intermediary manager of a family wealth portfolio focused on feeding the "system of action" operated by the three NPOs. The latter had developed an innovative action at the interface of a partnership-oriented relationship—taking place between the Quebec legislature and the Foundation—which demonstrated a relatively significant deficit in terms of consistency of purpose and a clear lack of cohesion in terms of the intentions mobilized by each of the stakeholders.

Fourth, from the mid-1980s, the effects of the neoliberal model of the state's management of federal and provincial actions became more and more explicit, particularly with the coming into power of the Couillard government. This environment generated tensions, in terms of legitimacy and relevance of the partnership-oriented model, between the Foundation, an organization whose mission is to work for the prevention of poverty through educational success, and the Quebec legislature, which did not display an effective desire to work towards reducing social inequalities or to engage in an open dialogue with organized civil society about poverty.

Fifth, despite the definition of specific action models, the Foundation has always pursued an

ambidextrous organizational approach to social innovation.[16] This allowed the Foundation to support experiences relatively disconnected from the first models put in place. For example, as of 2002, the Foundation has been supporting the *Collectif pour une Québec sans pauvreté* or, as of 2004, the approach of *Parole d'excluEs*; and more recently, from 2002 to 2003, there has been the conceptualization work it carried out together with *Centraide of Greater Montreal* to design and implement the Collective Impact Project.

Figure 5:   From a partnership model of action to a direct support approach
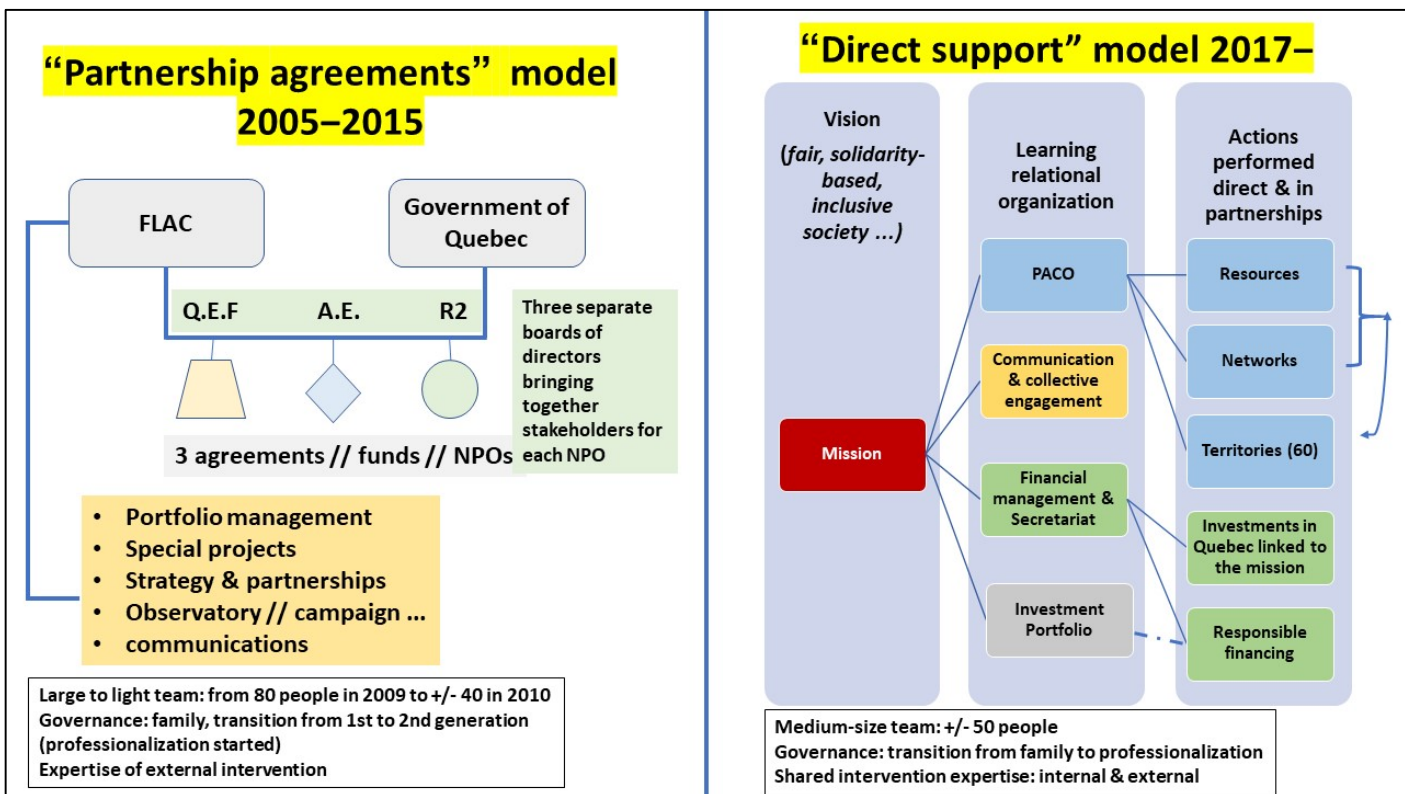
These parallel experiments suggested the possibility of acting with a rationale that was less prescriptive, more socially acceptable, and more respectful and enabling for the supported environments, thus leaving more room for advocacy, experimentation and social innovation. This vein, resulting from the Foundation's own actions, combined with the development of a more collaborative work space between Quebec foundations and supported by theoretical proposals inviting the philanthropic community to work collaboratively to generate collective impacts to participate more effectively in efforts to transform institutional systems, became central in 2015 in the reflexive budding that led to the formalization of the Foundation's fourth model of action.

This new model was designed by incorporating the learnings of the first fifteen years of action of the

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[16] "Organizational ambidextrousness is the ability of the company to be effective in managing the current demands of its business while simultaneously being responsive to changes in the environment. Organizational ambidextrousness is the idea that the long-term success of a business depends on its ability to not only build existing capabilities and improve the efficiency of the business but also to explore completely new fields." (Our translation; https://fr.slideshare.net/yhafid001/marketing-stratgique-ambidextrie-organisationnelle).

Foundation. As the result of a self-criticism, it defines the framework of a contribution which must now pass the acid test in practice. All in all, the analysis that we made of this work proposal allows us to identify avenues of action to improve the grasp and scope.

3.2 Avenues of action

The Foundation presents its action model on its website using an infographic (see below) that summarizes the overall rationale of the new work strategy. This strategy is based on a "modest" intention where the Foundation's action is presented in terms of a contribution aimed at supporting actions conceived of and carried out within "spaces of solutions, innovations and learnings" and unfolding around three major scenes, namely networks, territories and resources.
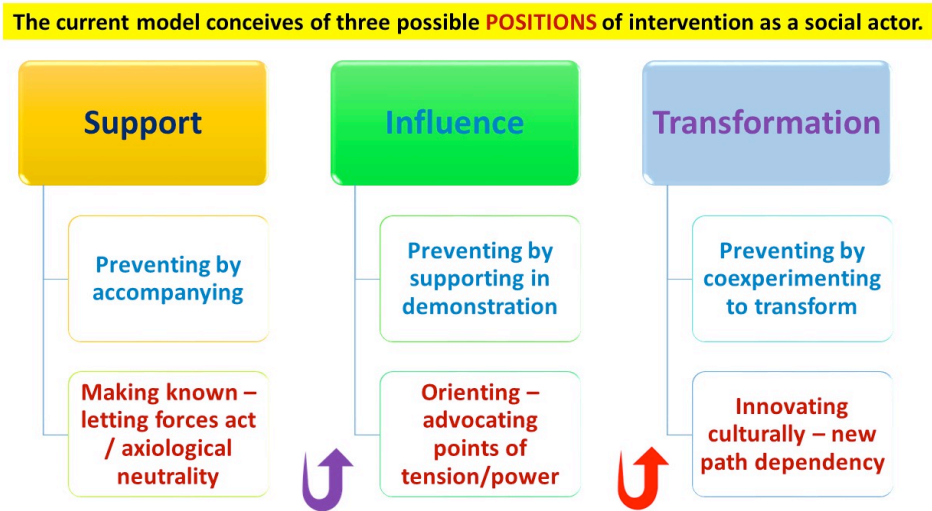
Figure 6:   The contribution of the Foundation and its benefits
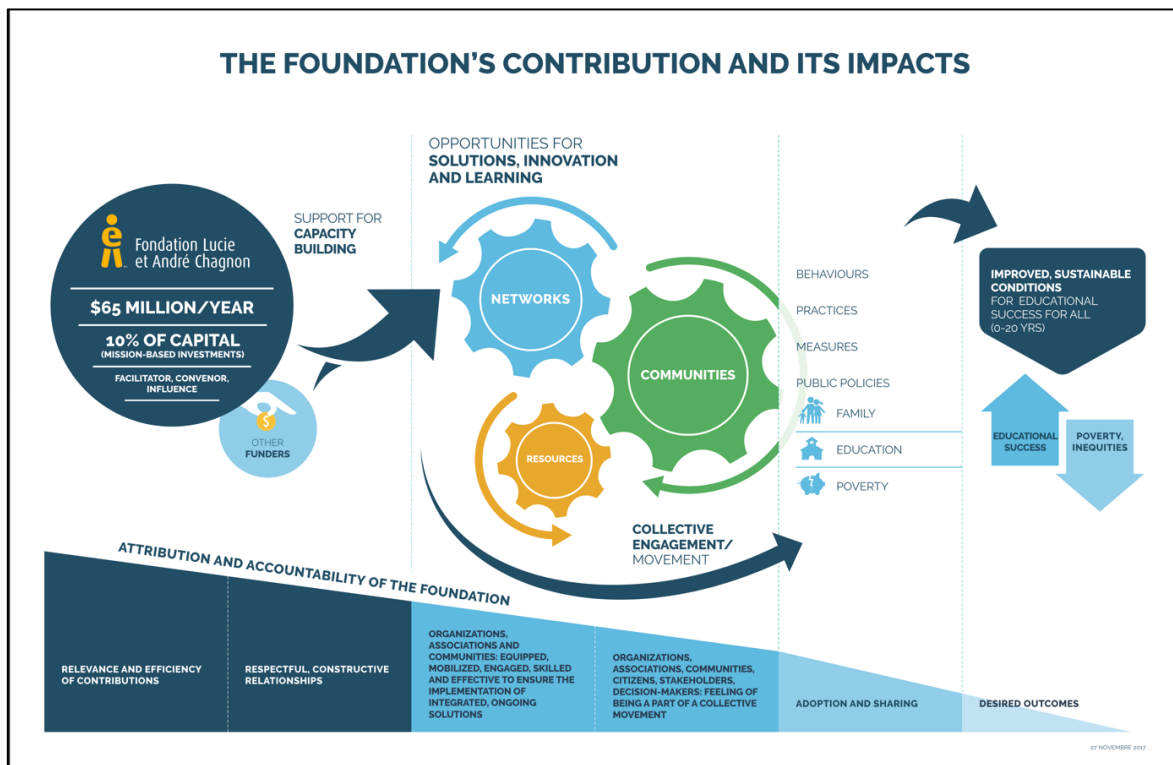
This strategy, as indicated by the Foundation's accountability process described at the bottom of the diagram, clearly demonstrates a variable and "declining" accountability for the actions of the Foundation. The more the action is carried out by third parties, the less accountability can be associated with the Foundation's action and the more it falls upon the partner organizations it is called upon to support.

From this action model, we identified three positions (Figure 7) as a way to clarify the role and responsibilities of the Foundation.

Figure 7:   Three possible positions of intervention

The current model conceives of three possible POSITIONS of intervention as a social actor.

Support	Influence	Transformation
Preventing by accompanying	Preventing by supporting in demonstration	Preventing by coexperimenting to transform
Making known – letting forces act / axiological neutrality	Orienting – advocating points of tension/power	Innovating culturally – new path dependency

The first position is one of pure and simple support and fits well with the spirit that emerges from the Foundation's current proposal. It is a question of acting through prevention, by accompanying capacities to act in a pluralist way that would be essentially driven by other initiatives. A certain neutrality emerges from this position in which the Foundation essentially plays a role of mediator or intermediary. It is then a question of putting actions behind the scenes in order to allow initiatives to be in a better position to strengthen their capacity to act or to innovate, experiment and exert pressure.

To this first position of support can be grafted, in a second step, a strategy to promote the influence exerted by the direct action of the Foundation. It is then a question of relying on the learnings that emerge from the actions resulting from the first position to allow the Foundation, in concert with the initiatives supported, to identify actions that cannot not be done at the scale of the supported initiatives that would allow access to certain situations.[17] For example, it may involve working through influential institutional unlocking, resulting from public policy, bylaws or ideological behaviour. The position of the Foundation is then less an "accompaniment of a rational action mobilized by other organizations" than a position of "extending their capacity for action" in order to simplify or facilitate the working environment of organizations that are supported by the first position. The Foundation's ability to be a full-fledged player then increases by a notch, allowing it to act on the points of tension and power present within the large institutional fields of the state, market or civil society.

To this second position can be added a third channel of action, that of transforming the societal cultural framework. According to this third position, it is not only about supporting to reform and to influence but also about acting to generate transformative actions on a large scale. The position is one of prevention, allowing to experiment in order to radically transform. This third, more complex path falls

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[17] On the concept of socio-technical unlocking, see: https://breizhsucre.wordpress.com/deverouillage-sociotechnique/; http://agreste.agriculture.gouv.fr/IMG/pdf/analyse631309.pdf; https://books.google.ca/books?hl=fr&lr=&id=h_NfDwAAQBAJ&oi=fnd&pg=PP1&dq=d%C3%A9verrouillage +th%C3%A9orie+transition&ots=TxrbrBWj0T&sig=ECisZ9KiIpyC7Ys7JMtXYg3FyIs&redir_esc=y#v=onepage &q&f=false.

within the fold of epistemic cultural innovation. It requires a higher level of collaboration and alliances in order to collaborate with other social actors, in social mobility mode, to identify and experiment with initiatives that would pave the way for one or more new paths of dependency.

Figure 8:   Three positions to deepen the capacity of action for support and learning
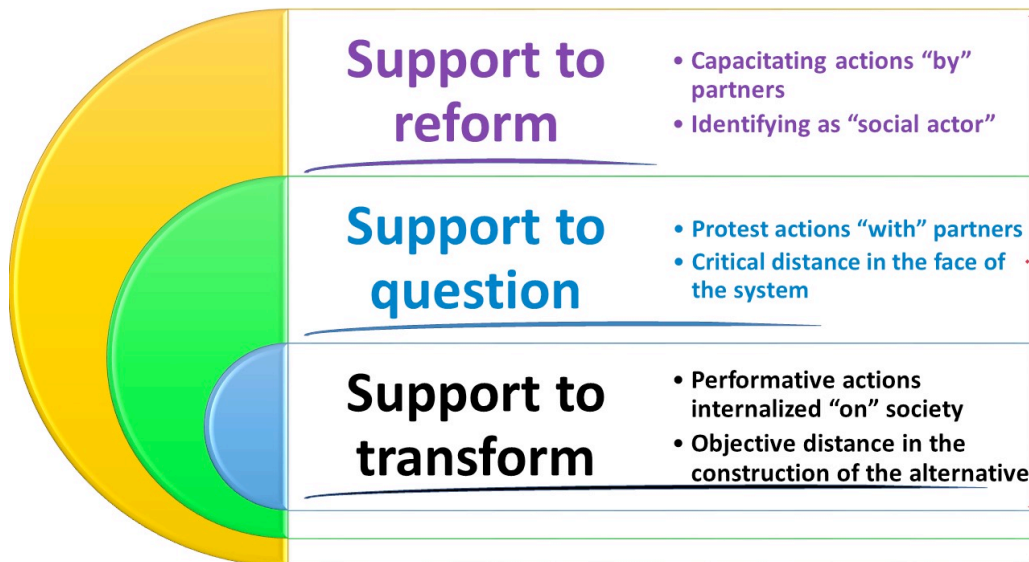
In summary (Figure 8), the first position can generate support actions to reform the system in place through the use of incremental innovations. The second position ensures a rise in the capacity of action to support in order to question and for a critical distance vis-a-vis the system in place to emerge, through subversive innovations. Finally, the third position aims to support in order to transform the cultural framework of existing institutional systems through radical innovations.

Depending on each of these positions, the object of the philanthropic action of the Foundation sees its target change and expand.

At the heart of the ability to act from the first position, the Foundation's focus is on its own organization. This means channeling the resources at its disposal to ensure the best possible performance in order to support reform initiatives that will, by themselves, generate the demonstration effects envisaged by the partnership and that will, on their own, have an influence on the institutional systems in place.

While this way of acting is fundamental, it fails to tackle the problems at their core. The resources, learnings and intelligence of the Foundation are put at the service of a reformist performance dictated by forces outside the Foundation and which cannot be controlled by an organization. We illustrate this way of acting with the image of a team of cyclists that has the best possible organizational set-up for winning the Tour de France. The entire emphasis is placed on the ability to win the race in favour of a type of competition in the service of economic interests and stakes. Certainly, feats and innovations are not only possible and real but are thwarted by a purely technical and economic competitive aim where it is impossible to modify the cultural framework of the very idea of the Tour de France. The only

option remaining is to continually augment one's own "physical, mental, technical and financial" efficiency at all times.

Figure 9:   Three distinct points of view
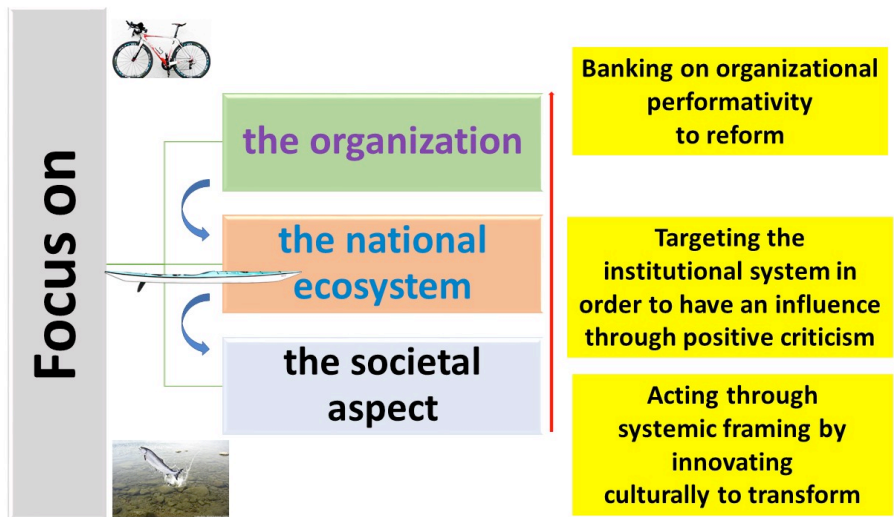
The capacity to act from the second position is driven by the idea of relying on a performing organization that allows acting not for the sake of being the leader— the infamous yellow jersey or a successful entrepreneur or politician—but to generate subversive actions that give the opportunity to innovate against the current. According to this position, it is a question of benefitting from the Foundation's ability to act in order to influence behaviours, ways of thinking and organizational or institutional practices, and proposing critical actions based on "other ways of doing things" by demonstrating their relevance.

We illustrate this second path with the image of "competitive kayaking," a sport resulting from technical innovations that allow us to go where no other means of transport can take us and to do so by defying the forces at play. For the Foundation, going in this direction would mean broadening the target. In the first position, which focuses on the Foundation's organizational capacity, a second work space would be added to influence the institutional ecosystem governing the action of the Foundation's partner organizations.

The third position emphasizes not only the national institutional ecosystem and organization but also the societal matrix. It is then a question of conceiving of a form of action that would innovate culturally in order to transform the neoliberal episteme by promoting new cultural foundations that are both ethical and aesthetic. We illustrate this way of working not with the help of a "material object," like the racing bike or the competitive kayak, but by using an "organic form" such as a marine animal, namely the salmon, which ensures its reproduction by crossing nearly insurmountable obstacles to "collectively" ensure the survival of its species.

The focal point of this third position would further elevate the level of reflexivity of the Foundation, situating it at the societal scale as part of an organizational cluster of actors who consider themselves as being in the service of inclusive, solidarity-based and ecological societies.

While the position of influence may seem to be an incursion into the political domain, and while the transformative position may seem revolutionary, we point out that politics and the revolutionary act are functions proper to the functioning of any organization. Developing a responsible investment policy is a political gesture that can initiate a revolution from the moment when the path proposed for future investments is based on ethical and aesthetic principles aimed at objectives other than those of capital growth and maximum profitability. Such actions can be considered to carry revolutionary impulses and include, among others: insisting on social and environmental criteria; ensuring that market investments respect the chosen criteria, and denouncing them if this is not the case; ensuring that collaborations and partnerships with organizations adhere to said criteria; ensuring that the principles put forward are respected; requiring the state to perform its duties with justice and fairness; and, finally, reminding civil society organizations that are experiencing a democratic drift of the unacceptability of the thing.

We consider these three positions as ideal-types of intervention. They can manifest in an iterative way in the form of evolutionary phases of development of "actions in reflection" and "reflections in action."

Acting on these three positions would change the way in which the Foundation's framework for action is represented. To illustrate the change that will take place, we have taken up the main elements of the content of the chart used by the Foundation to represent its model of action, its "contribution and its impact" on the basis of the application of the three positions mentioned. This new representation revolves around the Foundation's organizational dimension, which can change form, shape and scale depending on the position adopted.

Figure 10:   An integrated representation of the Foundation's action
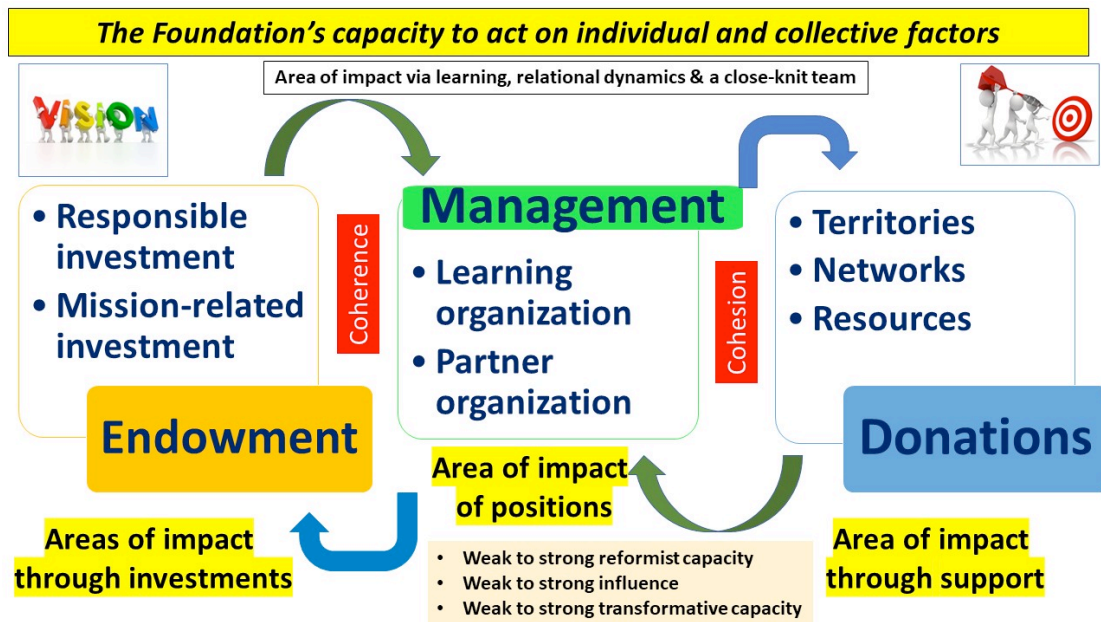
In fact, the management methods of the organization, in their internal and external dimension, would need to be modified according to the respective importance accorded to positions I, II or III. The learning and partnership scope would differ if the focus was on a reformist strategy in which the

Foundation would play a discreet and unobtrusive role, as opposed to a direct and exposing reformist strategy where the Foundation would be given the opportunity to influence the course of things in a direct manner. The learning and partnership scope would be even more different if the Foundation, in concert with other social actors, opted for a strategy aimed at developing a capacity to transform the civilizational framework of our societies. For each position, the ecosystem of the Foundation would gain in scope and density, whereby its "organizational" operating mode would also be transformed.

We conclude this section by recalling the importance for the Foundation to be attentive to a double lesson that emanated from its historical trajectory. This lesson relates, firstly, to the need to reduce both the coherence and cohesion deficits that invariably afflict any organization that fails to take the required steps for counteracting this phenomenon.

For the Foundation, the call to coherence and cohesion is therefore a central issue. Taking this issue seriously requires engaging in substantial organizational practices. The latter will contribute to the organization's relevance, credibility and legitimacy and reflect an organization in which all the elements composing its identity, from the investment of the endowment to the allocation of grants, are orchestrated in keeping with the adopted vision and mission.

A second lesson that emerges from the historical trajectory of the Foundation is the importance of not relying solely on one model of action so as to prevent locking in existing possibilities. Working toward ambidextrous innovation provides an organization with the ability to explore or test new avenues of action. Our proposal of working with three positions provides the Foundation with the possibility to formulate the need to act towards **ambidextrous** innovation in a more directed framework.

Conclusion: "We are the children of our parents" and, conversely, "the parents of our children"

The four intervention models that we have highlighted to describe the Lucie and André Chagnon Foundation's historical trajectory illustrate the contemporary work done by philanthropic actors relatively unknown to the general population. The study of this trajectory has allowed us to shed some light on a sector of intervention that has played an important role in the development of Quebec's modernity and will continue to be a key player for the Quebec of tomorrow.

We situate the importance of the philanthropic sector as a complement to the centrality occupied by the state and the market as the two main institutional fields. In the face of these two fields, there is civil society, a heterogeneous and hardly uniform amalgamation of formal and informal identities and practices, in which we find the philanthropic sector and the philanthropic sub-sector. This civil society has historically positioned itself in the face of the market and the state by valuing and recognizing the validity and relevance of their actions all the while, paradoxically, criticizing these institutional fields and calling for the dismantling of the rationales behind their actions. Either of these positions contribute to the evolution of the civilizational momentum which frames, like a constitutional matrix, the development of our societies.

These three fields of institutional and organizational action are currently facing a civilizational emergency of magnitude unprecedented in human history. Faced with this urgency, the actors with the most capacity to act have succumbed to an inertia that freezes and blocks their potential for critical transformation of our civilizational momentum. Presently, all the energy, intelligence, resources and power of the state and the market are mobilized for the cause of wealth for the benefit of a tiny portion of the human population, in a development that is neither socially equitable, ecologically nor economically sustainable; in short, it is unsustainable development. To this end, the major institutional players are mobilizing the entirety of the Earth's resources (and, where appropriate, those of the solar system!).

Civil society is an observational arena from which can spring a strong capacity for reflexive and practical action with a critical reach. The long history of social movements is proof of this. Hence, this arena contains a lot untapped potential. It offers the room to maneuver needed for a "collective action" that could generate one or several axiological movements of different scope, aiming for, if there is consensus, the establishment of a "common episteme" with a view to generating a civilization of *buen vivir*. This is the hypothesis that we defend.

The grantmaking philanthropic arena benefits from conditions that give it strong relative autonomy. Taking advantage of this "freedom" to act at the service of the primary meaning of the philanthropic identity, "the well-being of others," represents a central resource for tackling the challenge of building a society that is inclusive, democratic, supportive, proud and ecological.

Our study underlined what the Foundation owes to its past (for example, to its origin, its acquired learnings) but also what it owes to its future, in order to orient itself today. We are certainly the children of our parents, but we are also the parents of our children. It is important to remind ourselves of the responsibility that this truth imposes on us and points to in terms of actions to consider, to implement and to respect.