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Historic trajectory of the Lucie and André Chagnon Foundation

Executive Summary

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Timeline from 2000 to 2018: Executive Summary

Équipe PhiLab

Projet « Histoire de la Fondation Lucie et André Chagnon »

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Overview

In this Executive Summary, we summarize the highlights of two studies¹ produced for the Lucie and André Chagnon Foundation² (hereinafter “the Foundation”). The main objective of the studies was to identify and analyze the historical trajectory of the Foundation from its creation in 2000 to 2018.

To achieve this goal, we performed two separate but complementary operations:

- The first documented the first ten years of the Foundation (2000 to 2010). The objective was to identify the intervention models that were deployed during this period. By intervention model we mean the key strategy or approach favoured by the Foundation at a given time of its development.
- The second study adopted a complementary analytical perspective. The aim was to identify the various factors that led the Foundation’s management team to design and deploy, starting in 2015, a third intervention model.

For this second operation, we continued the initial work of historical analysis and completed it by producing a study on the recent socio-economic situation. This allowed us to situate the working methods of the Foundation in relation to the key elements of the global, Canadian and Quebec context that were identified, while taking into account new theoretical approaches and intervention practices observed within the US or Canadian grantmaking philanthropy sector.

The following are four key elements that emerge from both studies and around which our summary is organized:

- a presentation of the Foundation’s first two intervention models;
- the key learnings leading to the adoption of a third intervention model;
- need for clarification concerning the key elements of the third intervention model;
- a proposal to improve the Foundation’s third intervention model.

¹ The studies were conducted in 2011–2012 (Phase I) and 2018 (Phase II). Each of the studies culminated in research papers that we grouped together in two major appendices to the report entitled “Historical Trajectory of the Lucie and André Chagnon Foundation. Historical Timeline 2000 to 2018, Master Document.” Appendix IA describes the major phases of the Foundation’s evolution between 2000 and 2010, and Appendix IB presents the Foundation’s ecosystem for the same period. Appendix IC takes an analytical look at the first ten years of the Foundation, identifying findings and proposing scenarios for making strategic choices. Annex IIA looks at the historical period from 2009 to 2018. Annex IIB provides a summary of the contextual elements that accompany and influence the recent evolution of the Foundation. Appendix IIC proposes a detailed analysis of the socio-economic situation for the year 2018.

² 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, it provides 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>)

Trajectory of the Foundation from 2000 to 2010: Two distinct models of intervention

The history of the Foundation begins with its incorporation in the fall of 2000. A first model of intervention was defined and it broke with the approach of “artisanal patronage” that had characterized the long period of philanthropy carried out by the Chagnon family between 1960 and 2000. With the creation of the largest Canadian grantmaking foundation, the philanthropic practices of the Chagnon family entered the realm of “organized or institutional philanthropy.” This first phase of the Foundation’s development was based on an approach that we describe as being “intuitive and prescriptive” around two main areas of action: health and poverty. The Foundation’s leaders sought to make a difference by mobilizing, through preventive action, a variety of environments, including the community action sector and the Quebec public sector. With representatives from the latter, the Foundation tested in 2002, a first partnership with the Government of Quebec around the question of healthy life habits. This partnership led to the creation of the *Québec en Forme* project. In the eyes of the Foundation’s management, the success of this experiment spoke in favour of reframing the *model of intuitive and prescriptive action* according to an approach that would be centered on a partnership with the public legislature. The Foundation then joined forces with the Quebec government to implement an intervention model that we describe as a “functional partnership” in which the two partners’ capacity to act was delegated to three distinct non-profit organizations (NPOs): Québec en Forme, Avenir d’enfants and Réunir Réussir.

Both the Foundation’s first model of intervention, divided between actions geared towards this philanthropic organization’s development and an intention to act in an intuitive and prescriptive way, and the second model, around the functional partnership with 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; some indicated a good level of satisfaction while others clearly expressed dissatisfaction with, if not opposition to, the Foundation.

In 2009, the criticism directed against the Foundation was examined by the Foundation’s team of professionals and board of directors. Thus, from 2010 on, when the deployment of the partnership was nearly finalized, increasingly pronounced questions alongside dissatisfactions came to the forefront on the validity of the partnership model adopted. In 2015, the Foundation’s team, together with the Quebec government, announced the non-renewal of the partnerships and the Foundation signified its intention to embark on a new path of intervention.

Key learnings leading to the third intervention model

A demanding job requiring special skills, know-how and practical experience

While the forty years of the Chagnon family’s patronage preceding the creation of the Foundation have shown the importance of having significant financial resources to better structure a capacity to act in a philanthropic way, the implementation of the first model of intervention demonstrated that the job of “organized or institutionalized philanthropism”

requires not only specific skills and competencies but also specific practical and theoretical know-how. This philanthropic culture is not only specific but is above all different from organizational cultures mobilized by private entrepreneurs or by elected or public organization officials.

The philanthropic action of the Foundation: A capacity to act as part of a Quebec development model undergoing transformation

The implementation of the Foundation's first intervention model and the very rapid shift to a second model meant an imperfect integration of the Foundation, as a social actor, into Quebec's development model³ that was undergoing changes at the time. The study of the first phase of the Foundation's history shows how little consideration was given to this development platform and to the particular place and role that Quebec grantmaking philanthropy could play. Taking this learning into account has become central in the reconfiguration of the intervention model, both regarding the forms of relationships to be developed with or for other stakeholders in the Quebec model and in terms of the importance of considering the evolution of socio-economic linkages and their impact on the evolution of Quebec's development model.

A continuous upgrade of knowledge and capacity for action

One of the lessons learned from the first phase was linked to the Foundation's constant need to upgrade the capacity of the internal and external resources it mobilized (e.g., salaried staff, support for intermediary organizations, support for funded organizations).

Opting for a non-hierarchical relational model

A second learning focused on the relational model towards its partners that should have been adopted by all of the human resources mobilized within the organization. It was less a question of working vertically from a hierarchical position of authority than of adopting a horizontal relational approach that respects their collaborators' identities and their ways of being and acting. In the early 2000s, the difficulties experienced by the Foundation in its relations with the community reflected oversights related to the fact that these elements were not taken into account. They also revealed a structural tension related to having to exercise a power dynamic inherent to being a funder while seeking to ground this collaboration in a non-hierarchical relational model.

Beyond wanting to act collaboratively, a specific position and operational model are required to maximize this relational approach.

Finally, while the development of a partnership with the public legislature was based on a collaborative approach, the framework of delegating the operational management onto three separate organizations generated new challenges. In addition, the "functional partnership with the public sector" model has not permitted either to consider the specificities of the

³ By development model is understood (our translation): "a relatively complex configuration that imposes itself after the fact as likely to put economic and social development in relative coherence for a long period of time ... a development model supposes a social group or social alliances, a relatively coherent vision of the world, a way of organizing production and collective services, a regulation method, a set of mechanisms for resolving conflicts between social actors and, finally, an insertion into the global economy" (Levesque B. (2000), "Preface," in G. Bourque, *Le modèle québécois de développement : de l'émergence au renouvellement*, Quebec, Presses de l'Université du Québec, p. VIII).

organizational culture of Quebec legislature or of the philanthropic sector. This partnership model, despite a few attempts, has failed to identify or implement the particular conditions required to carry out such a partnership.

The main features of the third intervention model

The third action model deployed by the Foundation from 2015 onward is based on a modest intention where the Foundation's action is presented in terms of a contribution intended to support actions conceived of and carried out autonomously within "spaces for solutions, innovations and learnings." These are intended to unfold around three major contexts: networks, territories and resources. According to this new model, the aim is to, on the one hand, support collective initiatives carried out by different circles in their preventive actions to both counter poverty and improve educational success and, on the other hand, learn from the actions and capacities-to-act that were mobilized and deployed to make Quebec a more unified, just and inclusive society. The Foundation's new proposal and position reflect a much better defined and assertive societal integration. The specific role of the Foundation, as a social actor, is clearly emphasized.

However, certain elements of the new intervention model need to be clarified.

Because the conceptualization and operationalization of the third model of intervention is not finalized, it requires testing. All in all, based on our analysis of the latter, some of the intentions or dimensions of the new model would benefit from being specified. We have grouped the specifications into five major areas of clarification: 1) better define what is meant by "learning organization"; 2) make more explicit the nature of the support to be given to the collective actions that become partners of the Foundation; 3) fine tune the meaning given to "the relational approach"; 4) make more explicit the philanthropic role of the Foundation on Quebec territory; and 5) make more explicit the means put in place to ensure a high level of coherence and cohesion, both internally and externally, between the Foundation's vision and actions.

For the Foundation, the call for coherence and cohesion represents a key historical issue concerning its functions and organizational components as well as its relational methods in terms of: its organizational structure; the management of its endowment; the power dynamics related to forms of collaboration; or actions taken directly by the Foundation. Responding appropriately would increase the relevance, credibility and legitimacy of both its intervention model and of its mission and associated vision.

Proposal to improve the Foundation's third intervention model

Our reading of the third model of intervention allowed us to identify two elements of improvement that are presented in the form of three possible positions to be adopted by the Foundation and which are associated to specific roles and responsibilities.

The first position of “*support for reform*” corresponds to the Foundation’s current intervention model, as communicated in 2008 on its website. This position generates actions of non-prescriptive support for collective partnership initiatives to improve the system. Depending on the lessons that will be drawn from the model, this position will mainly pertain to organizational reforms corresponding to incremental forms of innovation.

By complementing this first approach with the second position of providing “*support for questioning*,” the Foundation would place itself in an intervention position that could amplify the capacity of action of its intervention system. The work and learning procedures thus deployed would allow for the support of collective actions with partners capable of questioning the system in place and to consider possible provocative solutions in order to propose, in the form of innovative clusters or more radical forms of innovation, new institutional arrangements.

Finally, the third position, called “*support to transform*,” would represent a layer that complements the previous work. This path would support collective actions that would be empowered to transform, through disruptive innovations, the cultural framework at the foundation of the institutional systems in place. This third way of working would allow for a broader collective mobilization and would rely on widely communalized learnings that demand exploring new path dependencies, namely in the perspective of a social and ecological transition. This mode of intervention would be part of an approach that breaks with the cultural orientations promoted by neoliberalism.

Finally, a major lesson emerges from the historical trajectory of the Foundation, that of not relying on only one intervention model. Our proposal to act with three complementary intervention approaches would provide the Foundation with the opportunity to develop a more structured and coherent framework and to act by strategically combining different innovation channels with more efficiency and relevance.

