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WORKING BETTER TOGETHER

Exploring Options for a Public Policy Network for Canada's Charitable and Nonprofit Sector

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Prepared for Imagine Canada

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I am grateful to Bruce McDonald (CEO), Cathy Barr, and Bernadette Johnson for the invitation to reflect on and recommend approaches to a proposed model for a public policy network for Canada's charitable and nonprofit sector.

I am grateful to the many individuals who contributed their thoughts, experiences, concerns, and aspirations with me in conversation.

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Cathy Taylor	Executive Director	Ontario Nonprofit Network
Paul Taylor	Executive Director	FoodShare Toronto

This report, its recommendations, and any errors it may contain are my own.

The hope is that this report will serve to fuel important conversations about better policy coordination for Canada's charitable and nonprofit sector and, in turn, more just and sustainable communities.

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[1] Maggie MacDonald, Director, Communications and Government Relations at the McConnell Foundation joined the conversation for this interview.
[2] Paula Speevak retired from Volunteer Canada in 2021.

EXECUTIVE SUMMARY

I am grateful to Imagine Canada for the invitation to explore options for a proposed public policy network for Canada's charitable and nonprofit sector. I am also grateful to a diverse group of sector leaders who gave of their time in conversation which form the basis of this report. The conversations surfaced elements of consensus and critical points of divergence reflecting both the diversity of the sector and the challenge in creating a united voice to amplify its influence on public policy.

This research project is rooted in the conviction that the sector would benefit from a place where those who work to advance policy with a focus on the Federal Government and with a sector-wide perspective could come together to influence public policy. It aims to measure the appetite, test the feasibility, and explore design features for such a network.

Many thought that such a network would be a good and timely idea. Others had reservations about the objective to create a united voice for the sector observing that this lack of coherence was reflected in the sector already being networked in a growing number of ways. Some saw the growing number of

"We need to stop looking at the common denominator."

coalitions giving voice to different parts of the sector and to equity-seeking groups as a positive – although at times messy – expression of the vitality of the sector and of the emergence of new social movements.

The discussion of the purpose of an eventual network did not yield consensus. One cluster imagined the network with a focus on funding, regulation, relationship to governments, and organizational-capacity building for charities and nonprofits. They imagined the network as strengthening the capacity of the broadest range of nonprofit and charitable organizations to advance their purposes through greater influence on public policy. A second cluster imagined a network designed to address issues of justice, diversity, equity, poverty, decolonization, systemic racism and discrimination, and inclusion. This second cluster of respondents understood the need to deal with issues of regulation, funding, and organizational capacity-building as ancillary to the paramount objective of the network to create a more just, inclusive, and equitable society.

A higher level of consensus is reflected in discussions of the nuts and bolts of how a network would advance its purpose, but this must be read with an appreciation

for the absence of consensus on the network's purpose itself. The challenge of creating unity of purpose in such a network is real. Defining a powerful and compelling vision for a single network that would energize the entire charitable and nonprofit sector in its broadest ambit may not be feasible. Creating a network of progressive voices and organizations and their allies to influence policy might offer a more compelling vision.

The discussions of the network's activities reflect big ambitions. The network's key focus would be on advocating for policy change. Activities necessary to enable the advocacy work include engagement and convening; policy research, data collection and analysis; awareness building with a focus on thought leaders and public and elected officials; and capacity building and learning.

Many respondents expressed a strong desire to ensure that key decisions about values and policies are confirmed or validated by the broadest membership reflecting the preference noted earlier for a network that engages its participants in a rich way and on a perennial basis. Reflecting the distributed and non-hierarchical approach to more de-centralized networks, many imagined decision-making within the network to be generally by consensus with the proviso that consensus may not be possible on many areas of policy, nor should it be the goal.

Many embraced the complexity and ambiguity inherent in advancing an agenda which could reveal elements of cleavage, diversity, or disagreement on certain policy issues while others were prepared to harness this diversity of perspectives on the policy priorities as a source of strength.

All understood the need for a small steering committee drawn from individuals who are active participants and reflective of the diversity of the country with a facilitative role. All were clear that participating in the network should not require organizations to relinquish their independence in dealing directly with governments.

Respondents were consistent in reflecting their fear that individuals delegated to participate in the network would not be reflective of the diversity of the country. They urged caution to ensure that the recruitment of participating organizations be implemented in ways that would ensure that the participants reflected this diversity.

Respondents clearly understood an initiative of this type to have a longer-term timeframe with the need for the network's structure to be flexible and adaptive to changing issues and approaches. The majority favoured a network with a hosting arrangement with one or more organizations for its administrative back-office functions. Respondents agreed that the network should be independent of its host in terms of values, policy, and engagement activities with the sector. Many expressed fear that this independence could be tested if the hosting organization pursued a policy agenda of its own thereby creating a conflict of interest or the perception thereof. There was no agreement as to the potential host or co-hosts of a network.

Some respondents commented on the fear that a network would not only fragment policy efforts but also fragment the financial and human resources available for sectoral policy coordination and mobilization and might generate increased competition for those resources.

Funding from charitable foundations with an interest in public policy and/or in building the capacity of the sector was seen as the single most promising source of funding for such a network.

The appetite for greater impact on public policy is broadly shared. This excitement merits a process of convening of sector leaders to make important choices on issues ranging from the purpose and hosting arrangements for a network. Respondents did not agree on who might be best placed to convene such a process, yet many expressed a desire to see one implemented. This is a conundrum that should not deter sector leaders from launching a convening process to develop legitimacy, build excitement, and finalize blueprints for the possible launch of a network.

BACKGROUND

This initiative is rooted in the conviction that the sector would benefit from a place – I will describe it as a network for now and return to the question of the specific form and the appropriate moniker for such an initiative later – where those who work to advance policy with a focus on the Federal Government and with a sector-wide perspective could come to share information, learn, and collaborate to advocate for policy change.

This report marks the culmination of a research project to measure the appetite, test the feasibility, and design a proposed model for a public policy network (working title) on behalf of Canada's charitable and nonprofit sector (the sector). I was commissioned by Imagine Canada in July 2021 to explore questions related to policy collaboration in the sector.

From the outset, Imagine Canada was explicit that this proposal was not to build a network to advance its own public policy agenda, nor could it be presumed that it would be easy to reach consensus on a suite of policy priorities for the sector as a whole or on the specific approach to a given policy issue.

In conducting the research, Imagine Canada directed me to be agnostic about its role in such a network. From the outset, the study did not presume that Imagine Canada would necessarily convene, host, or fund such a network.

This work was conducted twenty months into a global pandemic which has thrown our most basic routines upside down. The economic upheaval it has unleashed has grown to rival that wrought by the Great Depression. The pandemic has unleased a global reckoning with systemic inequity and injustice deepened by racial and other forms of discrimination. A broad movement of equity-seekers and their allies has grown quickly aiming to build a more just and equitable world where every person facing discrimination, prejudice and poverty is able to thrive.

The pandemic and the related emergency measures governments implemented in response engendered dramatic impacts[3] on charitable and nonprofit organizations. Peak organizations representing charities and nonprofits (or sub-sets thereof) went into overdrive to seek financial and other relief from governments. Equity-seekers and their allies also went into overdrive to seek financial and other relief to

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[3] Barr, C. and Lasby, D. The uneven impact of the pandemic on Canadian charities, Sector Monitor (2021, August). Imagine Canada. https://imaginecanada.ca/sites/default/files/Sector-Monitor-The-uneven-impact-of-the-pandemic-on-Canadian-charities.pdf

remedy the inequities which were deepened and made dramatically more visible by the pandemic.

The pandemic fostered new ways of working virtually and, building on the ease with which people could be convened in the virtual world, accelerated the development of new coalition efforts to seek various types of relief for the whole sector or sub-sets thereof.

The pandemic created opportunities for groups which have long worked hard to address historical inequities to be amplified and heard. The focus on historical inequities which were revealed and deepened by the pandemic also triggered deep questions of legitimacy for many of the sector's more traditional actors many of which do not reflect the diversity of Canada in their leadership.

METHODOLOGY

The research was conducted during the fall of 2021 and early winter of 2022 using semi-structured confidential interviews with individuals who are (or have been until recently) active in policy development and advocacy for equity-seekers and/or for the sector or parts thereof.

The first three interviews were conducted with Imagine Canada leadership staff for the purposes of discovery and to agree on the target list for the remaining interviewees. To develop the target list of interviewees, each Imagine Canada staff leader was invited to develop a suggested target list of key informants. The invitation list was finalized in discussions with the Imagine Canada leadership. Care was taken to include individuals who better reflect the diversity of the country than is typical among sectoral leaders. Attention was also paid to including individuals who reflect the breadth and depth of the type and size of organizations involved in sectoral policy development and advocacy work while ensuring that conversation partners would have deep knowledge of the current policy landscape and knowledge of our sector's relations with the Federal Government. The list of the interview participants with their organization affiliations forms part of the acknowledgements above.

The key informant interviews were loosely structured confidential qualitative interviews (Appendix 1 –

Conversation guide for key informant interviews). A total of twenty-two interviews ranging in duration from 45 to 70 minutes were conducted in French or in English according to the preference of the interviewee. Participant consent including the consent to use Zoom technology to record a transcript of the conversation for the exclusive use of the author[4] was documented using the scheduling application Calendly. My notes and the audio tapes were analyzed. Consistent with the commitment to protect the confidentiality of individuals and their affiliations, no comments are attributed directly to individuals in the body of this report.

This work provided the insights, data and a full range of diverse perspectives which form the basis of this report. Because this research is qualitative and the interview participants were not randomly selected, generalization cannot be drawn to the entire leadership of the charitable nonprofit sector from these findings. A second limitation to this work is that the author is and has been a participant in sectoral policy efforts. He had acquaintance with most of the

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[4] One interview was originally scheduled via Zoom and consent was obtained via Calendly. The interview was rescheduled to take place by telephone at the request of the interviewee. Notes were taken in conversation, but the interview was not recorded.

participants before conducting the interviews. While the author's background and experience may enrich this research, it is undoubtedly a source of bias.

On key questions, where the data is sufficiently rich to reveal the level of agreement, the following scale is used throughout the report:

AGREEMENT	
Very High (VH)	A very high level of agreement reflecting a broad consensus among all respondents who embraced the notion of a network with organizational actors.
High (H)	A high level of agreement among most but not all respondents. Some respondents surface disagreements while others surface important caveats in reflecting cautious or tentative agreement.
Mixed (M)	A mixed pattern in the responses reflecting neither agreement nor disagreement. At times, the mixed responses are clustered reflecting a pattern in the groupings of respondents.
Low (L)	A low level of agreement reflecting the substantial disagreement among many but not all the respondents.
Very Low (VL)	A very low level of agreement reflecting an absence of consensus among the respondents.

Importantly, I did not seek to verify the level of agreement with the recommendations I have outlined in this report; the recommendations outlined below are my best advice based on the generous input of participants throughout the process.

Before starting to conduct interviews, Imagine Canada staff learned that Professor Susan Phillips at Carleton University had been commissioned by the Muttart Foundation and the Max Bell Foundation to conduct a research project on the options for a new leadership mechanism for Canada's charitable and nonprofit sector that can help the sector rebuild post-pandemic and engage with governments on sector issues over the longer term[5]. Imagine Canada staff and I had the

occasion to confer with Professor Phillips and, recognizing the significant overlap in these two processes, agreed to collaborate in several ways to enrich both processes. We agreed to share respective key informant lists, to acknowledge each other's study to those key informants who overlapped our respective lists in the hope of motivating them to participate in both processes, and to have periodic check-ins about our respective work while protecting the confidentiality of the data collected from our respective key informants. Professor Phillips shared a background paper which provided important context for these efforts[6]. I continue to share the view that the outputs of both processes will serve to illuminate important choices about the path forward for the sector.

[5] Excerpt from *Request for an Interview for a Research Project on Leadership Models for the Charitable Sector*, from the Philanthropy and Nonprofit Leadership Program in the School of Public Policy and Administration at Carleton University, November 10, 2021.

[6] Conway, M., Dougherty, C. and Phillips, S. '*Enhancing Leadership Capacity for Canada's Charitable and Nonprofit Sector: A Conversation Starter.*' (working paper, Philanthropy and Nonprofit Leadership Program, School of Public Policy and Administration, Carleton University, Ottawa, September 2021).

THE CONVERSATIONS

1. A GOOD IDEA?

I launched the conversations with a broad appreciative question to test whether the idea of a network – still loosely defined at this stage in conversation – was a good one, and to measure the appetite for involvement. Responses were mixed (M).

"I like the idea of coordination but I'm not sure that there is a problem to be solved. I wouldn't be opposed to it but it's not clear to me that the problem can't be solved in an ad-hoc way."

Some were quick to declare it a good and timely idea and were keen to engage in details of an eventual network's design features. Another group of respondents had reservations about the feasibility of such a network observing that the sector in its broadest ambit had never been united or coherent in its identity and that this lack of coherence was reflected in the sector already being networked in a growing number of ways. Some saw the growing number of coalitions giving voice to different parts of the sector and to equity-seeking groups as a positive – although at times messy – expression of the vitality of the sector and of the emergence of new social movements.

A smaller group of respondents did not believe it to be a good idea except with very important caveats. It was observed that a network would never be truly committed to de-colonization and reconciliation at its core and therefore not worthy of engagement unless such commitments were entrenched as the highest purpose of the network from its onset. Another respondent rejected the idea of the network because of a conviction that social change is best advanced when people – not organizations – are at the center of the change-making, acknowledging that if the network were designed as a platform for individuals to build an agenda focused on issues of justice, systemic racism and discrimination, and inclusion, then it would be worthy of engagement. The other respondents engaged in a discussion of a network whose actors included organizations, their representatives, and others. Reflecting this broad consensus, I focus my discussion of the data on a network whose actors would include organizations and their representatives.

Because of the range of responses to the basic premise of this project, my probing and the conversations which ensued were tailored to respond to the appetite of the respondents and the important premises or caveats each of them offered from the outset.

2. PURPOSE

The discussion of the purpose of an eventual network also yielded mixed responses (M). The responses were clustered in two distinct groups: *instrumental* and *impact* dimensions of purpose.

"There is such a variety of perspectives that exist in the sector. A network is going to be challenging when it comes to the diversity of perspectives."

One set of responses can be characterized as *instrumental* with a focus on issues of regulation, funding of the sector, relationship to governments, and organizational-capacity building for charities and nonprofits.

I describe these responses as *instrumental* because this group of respondents was motivated by the desire to change policy to equip organizations or sub-sets of organizations to better deliver impact each in their unique and different ways. These respondents were agnostic to the specific nature of the ultimate impact of individual organizations or sub-sectors and embraced a broad definition of the roles of the nonprofit and charitable sectors.

The second cluster of respondents imagined a network designed to address issues of justice, diversity, equity, poverty, decolonization, systemic racism and discrimination, and inclusion. The respondents discussed the purpose of the network by focusing on impacts on people and communities in terms of decolonization, equity, justice, and poverty eradication. This focus on the end before the means, leads me to describe these responses in terms of the beneficial *impact* on people and communities.

A single respondent encompassed both the instrumental and impact dimensions of purpose from the outset in describing the purpose of the network without additional probing on my part.

As early data quickly reflected this clustering of responses, I invited conversation partners in later interviews to explore the merit of the responses from the other cluster to explore whether these purposes could be married into a single broad purpose which encompassed both the *instrumental* and *impact* dimensions of purpose.

Those who initially offered an instrumental description of the purpose of an eventual network shared in the commitment to issues of justice, equity, diversity, inclusion, and Indigenous sovereignty (JEDI) and readily embraced such a commitment as a defining value and priority for such a network. Yet, some respondents were cautious to gravitate to a singular focus on JEDI suggesting a more expansive purpose which encompassed JEDI and other broad impacts in areas as diverse as climate change, health, international development, and education or in parts of the sector that serve an expressive function including the arts and places of worship.

Those who articulated the network's purpose with a focus on *impact* readily embraced the idea that the network would work to change policies, regulation, funding arrangements, and relationships with government but imagined these more instrumental efforts as ancillary to the paramount objective of the network to create a more just, inclusive, and equitable society.

> *"Pan-Canadian approaches have failed to honour and hear diverse voices. More often those approaches serve the interest of large organizations already in policy work at the national level."*

Importantly, the respondents clustered in the *instrumental* and *impact* descriptions of purpose did not correlate to the type of organization of the respondent (i.e., equity-seeking group, philanthropic peak organization or intermediary, sectoral peak organizations, youth service federation, etc.). For greater clarity, the respondents who described the purpose in terms of impact on JEDI do not correlate

perfectly with the responses from leaders of equity-seeking groups, and vice-versa.

The question of the breadth or singularity of purpose of an eventual network, and the related question of whether a focus on policy and regulation for charities and nonprofits should be ancillary to the purpose of justice and equity (rather than to a broader range of purposes encompassing the variety of sub-sectors within the charitable and nonprofit sector) appeared early as a key choice point in the design of such a network. This choice point also has a determining effect on other subsidiary choices to be made in designing the governance, structure, and operations of an eventual network.

The challenge of creating unity of purpose in creating such a network and in defining the boundaries of the networked domain will therefore be real. I am cautious as to the likelihood of success in defining a powerful and compelling vision for a single network that would energize the entire charitable and nonprofit sector in its broadest ambit. A more realistic ambition might be to develop a network bringing together progressive voices and organizations and their allies which would significantly improve coordination and effectiveness of policy efforts. Such clarity of purpose could serve to energize its participants.

3. ACTIVITIES

Beyond this discussion of purpose, respondents also engaged in lively discussions of the activities the network might implement. A higher level of consensus is reflected in the data about the nuts and bolts of how a network would advance its purpose, but this must be read with an appreciation for the divergence of views in discussions of the network's purpose.

"It has to be about advancing more than one agenda. It has to be plural. There will be disagreements in framing agendas; people will have to live with it and organizations will be able to opt out."

While some of the activities identified below might serve purposes other than those relating to influencing public policy, respondents identified these activities because they are integral to the process of advocating for policy change. Respondents accepted the premise that the network should have at its core a public policy purpose and that all the network's activities described below but be seen as supporting that core purpose.

The range of activities contemplated include:

- **Engagement (or Convening)** with sector leaders and 'people on the ground' is seen as having paramount importance in developing and framing policy priorities for the network or parts thereof (VH). While respondents accepted that consensus on policy priorities would not be easily achieved nor was it necessary (VH), many were adamant that engagement had to be rich, transparent, and deep to ensure that policy priorities could be advanced with legitimacy (VH).

  With no yearning to achieve consensus in framing a policy agenda, engagement becomes focused on defining zones of agreement within which people can coordinate and mobilize. Respondents embraced the complexity and ambiguity inherent in advancing an agenda which could reveal elements of cleavage, diversity, or disagreement on certain policy issues while others were

prepared to harness this diversity of perspectives on the policy priorities as a source of strength.

Respondents offered that engagement cannot be an episodic activity but must be ongoing and perennial. Others powerfully advocated the view that engagement activities must include people who experience injustice, discrimination, and inequity to create an agenda that has legitimacy in advancing policy and social change. Many offered that peak organizations generally have not developed the capabilities to engage people on the ground especially those who live in poverty or experience systemic racism and discrimination. A good number of respondents cautioned that Imagine Canada has not demonstrated a commitment to this type of engagement while others highlighted the Equitable Recovery Collective, convened and hosted by Imagine Canada, as a recent example of a shift in its approach to engaging new voices in building a collective agenda for change. Several respondents singled out the Ontario Nonprofit Network as an organization which has successfully developed mechanisms for engagement of its diverse communities.

- **Policy Research, Data Collection and Analysis** is understood to be a basic activity to advance solution-oriented policy proposals, building (or

synthesizing) the evidence base to support the policy priorities of such a network. Some conversation partners expanded on the link between policy research and data collection and analytical capabilities. Many recognized the unique strengths that Imagine Canada has in this area, others commented on the challenges of accessing data which tells the story of policy impacts on racialized and indigenous peoples, and others highlighted the need for such a network to create linkages to academic and other institutions (e.g., Statistics Canada).

- **Advocacy** was identified as the core activity ranging from advancing policy proposals and to pressing decision-makers to adopt them (VH). Advocacy encompasses a broad range of activities ranging from focused efforts to influence senior public and elected officials and more broadly based citizen mobilization activities where such mobilization efforts are required to create readiness among officials and thought leaders to engage in discussions of policy proposals.

- **Building Awareness** was identified as a role by some respondents (H) as an activity which is required to advance a policy agenda, but the focus was largely on building awareness among thought leaders and public and elected officials. Because the broad charitable and nonprofit sector lacks visibility with and is often poorly conceptualized by policy makers, I probed to clarify whether sector

leaders believed this visibility deficit needed to be corrected to be successful in effecting policy change. Respondents were not deterred by the apparent awareness deficit of the broad sector in seeking to advance a policy agenda. Rather, they saw the need for targeted efforts to build awareness among decision-makers (H) harnessing the significant awareness of parts of the sector be it through acquaintance with a sub-sector, with an individual charity or nonprofit in an elected official's constituency or the larger, well-branded charities and nonprofits (e.g., Red Cross, United Way, YMCA) which are well known by many.

- **Building Capacity/Learning** was identified as a role of the network by most respondents (H) although it was surfaced on an unaided basis by a few respondents only. With additional probing by me, respondents were quick to confirm these activities to be an important role of an eventual network. Many respondents saw the capacity building role of the network as especially important in respect of smaller and/or younger organizations (some less formally constituted than others) including many that have emerged recently to coalesce and give voice to equity-seeking groups (H). Whether the capacity building/learning role is a formal one with activities and resources appropriate to such ambition or is largely informal and the by-product of the network's other activities is less clear.

4. PARTICIPANTS

As noted earlier, all respondents except one understood the participants within such a network as including organizations (VH). The data is more mixed in terms of the range of participant types and the approaches to solicit their involvement (M).

"We need to be much more targeted, open and transparent that we are today and do specific outreach to attract more diverse voices. Peak organizations are white-led."

Some respondents imagined a network bringing together organizations which play a role in coalescing the interests and/or amplifying the voice of groups of charities and nonprofits. While I did not probe respondents to develop a typology of such organizations, examples used in conversation by respondents clustered around four main types of umbrella or peak organizations that have in common accountability mechanisms to their organizational constituents: (1) umbrella, peak, or capacity-building organizations for a sub-sector (e.g., Cooperation Canada, Health Charities Coalition of Canada, Canadian Museums Association); (2) the national or provincial office of large national charities often known as federations (e.g., YMCA Canada, Big Brothers Big Sisters Canada, Children's Mental Health Ontario, The United Church of Canada); (3) philanthropic intermediaries and peak organizations, and charitable foundations with an interest in building sectoral capacity (e.g., United Way of Canada, Philanthropic Foundations Canada, Muttart Foundation. Max Bell Foundation); or (4) organizations advancing the interests of equity-seeking groups (e.g., The National Association of Friendship Centres, the Network for the Advancement of Black Communities, Egale Canada). Importantly, many organizations do not fit neatly in the typology above and many play more than one of these roles (e.g., Canadian Women's Foundation, Foundation for Black Communities). Respondents who initially favored a more curated approach to the participants conceived the recruitment process as relying on a more focused series of invitations with very deliberate and serious efforts to ensure that the group of

participants included many smaller and potentially younger organizations advancing the interests of equity-seeking groups, and many peak and sub-sectoral organizations that work at the provincial or community level (e.g., Pillar Nonprofit Network, Chantier de l'économie sociale, Calgary Chamber of Voluntary Organizations).

Other respondents imagined a broader range of participants not limited to the type of organizations noted above. Reflecting this broader range, they imagined a recruitment process which combined pro-active outreach and open invitations disseminated through a range of well-networked organizations.

A few respondents who imagined a broad range of participants noted that it would be important for the success of such a network to include among its participants many of the largest and most established players, cautioning that they would need to be invited to come to the table prepared to share their power, resources, and legitimacy with smaller organizations. Other respondents were skeptical about the readiness of larger and well-resourced organizations to share resources and power in this way.

Few respondents were prepared to place limits on the type or number of participants reflecting a desire for openness and transparency in the approach to mobilizing the sector.

There was a great deal of consensus that the participants in the network would be individuals (staff

or volunteers) drawn from the participating organizations. Reflecting an appreciation for differences in scale of these organizations, respondents did not want to limit participation to individuals occupying specific roles. Rather, they expressed the view that the individuals so involved should be able to speak authoritatively on behalf of their organization (VH). Several respondents noted that an organization might delegate more than one individual or different individuals depending on the nature of the engagement or activity. There was also strong agreement that independent of the size of each participating organization or the number of individuals it might delegate to be involved in the network, each organization would hold a single 'vote' in the governance of the network although a strong preference was expressed for a focus on building consensus in decision-making rather than relying on formal voting.

"Success in such a network requires that leaders engage and participate personally. They need to mobilize their own internal networks to support policy change for the broader sector."

I probed to understand whether individuals who do not have an organizational affiliation (or have past affiliations) might be invited to participate in the network. To illustrate this, I mentioned names such as Hilary Pearson (former CEO of Philanthropic Foundations Canada), Donald K. Johnson (advocate for improved tax treatment of donations) and academics with a deep interest in the sector (Jean-Marc Fontan and Susan Philipps). Respondents were quick to acknowledge the important roles such individuals could play as participants in or advisors to the network. Yet, most were guarded or resisted the notion that individuals without a membership constituency and the accountability which such constituency implies to communities would carry the

same decision rights as participating organizations (VH).

A small number of respondents imagined the network as a place where individuals who experience inequity, injustice and discrimination are heard directly through the network's engagement activities. In their view, the network will possess legitimacy only if it hears the wisdom of those who face discrimination and are denied justice directly.

Respondents were consistent in reflecting their fear that individuals delegated to participate in the network would not be reflective of the diversity of the country. They urged caution to ensure that the recruitment of participating organizations be implemented in ways that would ensure that the participants reflected the diversity of Canada (VH). Many recognized that this would be challenging as the leadership ranks of many of the largest and most established organizations are generally not reflective of the diversity of the country.

I probed specifically to uncover the challenges of attracting participants to the network who conduct their work largely in French and/or with a focus on Quebec or francophone minority groups outside Quebec. Many commented that the challenge of attracting participants whose work is focused on Quebec or in areas of the Quebec Government's exclusive or near-exclusive jurisdiction (e.g., health, immigration, social services, education, and culture) is real. Those participants may see little relevance in engaging the Federal Government as it plays little role in policy or funding, and many of those participants may prefer or choose to work in coalitions that have a proven capacity to work in French. Others noted that the Quebec Government has been more responsive to the aspirations of the nonprofit community sector and has well-established mechanisms to engage and fund the sector and its capacity-building organizations. The *Secrétariat à l'action communautaire autonome et aux initiatives sociales* reflects the strength of these institutional frameworks.

Yet, the respondents probed on this issue, many of whom have knowledge of the nonprofit and community sector in Quebec, expressed the desire

that efforts be made to attract organizations based in Quebec and/or working primarily in French to the network. Many noted the vibrancy of the sector in Quebec and hoped that the network would stand to gain and learn from that strength. Others noted that without linkages to organizations with deep roots in Quebec or in francophone communities, it would be difficult to build strong links to parliamentarians from those communities. Reflecting this desire, respondents set the bar high in terms of the network's ability to work in both languages both in broader engagement and its governance (VH). I note that numerous respondents envisaged the network communicating selectively in other languages including in Indigenous languages while recognizing the resource implications of doing so.

5. GOVERNANCE

As noted earlier, all respondents except one understood the participants within such a network as including organizations. A dynamic tension is revealed in the data about the mechanisms for governance of such a network.

Many respondents expressed a strong desire to ensure that key decisions about values and policies are confirmed or validated by the broadest membership reflecting the preference noted earlier for a network that engages its participants in a rich way and on a perennial basis.

Many explained that virtual technologies ought to and could easily enable such an approach; many explained that the legacy of the pandemic will be the ease with which this type of virtual engagement has been made possible.

Other respondents reflected on the need for speed and adaptiveness in promoting a policy agenda. They expressed a concern for the effectiveness of decision-making if too many decisions require confirmation by a large and therefore more unwieldy body.

Respondents understood the need for a small steering committee drawn from individuals who are active participants and reflective of the diversity of the country (VH). Many added that they imagined such a group would be selected through a democratic process with an open solicitation of expressions of interest. Others also imagine the possibility that an initial *pro tem* steering committee might be formed more expeditiously. I will return to the discussion of the incubation period required to further define and prepare the launch of such a network.

The role of the steering committee is imagined to be facilitative and to focus on the operations of the network (VH) and on the implementation of the policy priorities determined by the broader membership.

Respondents imagined decision-making in the larger body representing all participating organizations to be generally by consensus. The notion of consensus here is one which is balanced by an acknowledgement that achieving high levels of agreement on many areas of policy will not be possible, nor should it be the goal (VH).

Rather, respondents imagined the network allowing various sub-sets to coalesce around shared policy priorities without presuming the involvement of all participants (VH). Consistent with this notion of a platform which could allow various actors to organize around different policy agendas is the view that organizations participating in the network would not be expected to subsume their organization's relationships with or policy efforts aimed at governments in the network.

All agreed that participating in the network should not require organizations to relinquish their independence in dealing directly with governments at any or all levels either for grants and contributions, to protest government policies or inaction, or to advance their respective policy agendas (VH).

6. STRUCTURE AND OPERATIONS

Respondents clearly understood an initiative of this type to have a longer-term timeframe as opposed to being time limited (VH). Many reflected on the need for the network's structure to be flexible and adaptive to changing issues and approaches; others imagined the network as a learning organization committed to reviewing its effectiveness and impact at intervals of approximately every three years.

Only one respondent imagined the network to be separately incorporated from its onset. The majority favored a network with a hosting arrangement with one or more organizations. Some admitted that after an initial period of 2-3 years, the network should consider the option to become more independent. One respondent imagined the network as potentially separately incorporated while relying on a shared services agreement to procure administrative and accounting services from a hosting organization.

Discussions about the role of Imagine Canada in respect to the operations of an eventual network surfaced many perspectives and no consensus.

"I guess my initial reaction is that Imagine Canada is having a crisis of confidence. That's a healthy reaction. I am more interested in re-thinking Imagine Canada to make it better."

I probed to understand the type of organizations which might be considered to host or co-host the network. Imagine Canada was cited most often in this context although a few respondents explicitly stated that it should be excluded from such a role (M). Many identified other sectoral umbrella organizations including ones with a provincial focus and organizations advancing the interests of equity-seeking groups. When asked specifically whether charitable foundations might serve as hosts for such a

network, the consensus was strong that they would not be suited for the role as they lack mechanisms for accountability to a community or constituency (VH). A small number of respondents identified universities or public policy think tanks (e.g., Carleton University, Canadian Center for Policy Alternatives, Public Policy Forum, Institute for Research on Public Policy) as potential hosting organizations (L). Most respondents insisted the hosting organization ought to have sufficient size and administrative acumen to serve as host while a few respondents expressed the wish that smaller organizations not be excluded from consideration (M).

Respondents agreed that the network should be independent of its host in terms of values, policy, and engagement activities with the sector (VH). Many expressed fear that this independence could be tested if the hosting organization pursued a policy agenda of its own thereby creating a conflict of interest or the perception thereof. This fear was raised by some in respect of Imagine Canada as host.

This raises the important question for Imagine Canada were it to be selected to play a role as host or co-host of whether it would continue to advance a policy agenda separate from the policy priorities which might be advanced by actors within the network. In effect, it surfaces an existential question of whether Imagine Canada would serve as a platform to mobilize sector actors to advance policy priorities rather than advancing an agenda which, in the eyes of some, is perceived to be Imagine Canada's own agenda lacking the legitimacy to speak for important parts of the sector.

Other respondents were clear that Imagine Canada is uniquely positioned, and best equipped to host or co-host a network which would perform a policy coordinating and mobilization role. Some feared that attempts to build a separate network without Imagine Canada's involvement would significantly reduce the sector's effectiveness. Others spoke of an urgent need for Imagine Canada to adapt its approaches to become more effective in engaging broadly with the sector and more effective in giving broad visibility to its engagement activities hoping that these changes could fend off the risk of fragmentation. Many expressed hope that this report might generate discussions within Imagine Canada about this opportunity.

Whether Imagine Canada is selected to play a role in the network or not, a reflection on these existential points is probably timely for Imagine Canada.

Some respondents commented on the fear that a network would not only fragment policy efforts but also fragment the financial and human resources available for sectoral policy coordination and mobilization and might generate increased competition for those resources. Many commented that a hosting arrangement with a host or co-hosts might create a conflict in terms of fundraising by the host(s) and the network for resources from the same relatively small pool of funders. Clarity about the ways in which fundraising would be coordinated in a hosting arrangement would need to be established from the outset. This same potential conflict arises if both the hosting organization(s) and the network levy a membership fee from its members. A small number of respondents invited the notion of a pricing bundle for membership in both the host organization(s) and in the network which would incent members to maintain membership in the host organization(s) and participate in the network at significantly discounted rates.

Respondents revealed a high level of agreement in terms of a membership model that introduced the notion of mutual accountability between the network and its participants.

Part of the accountability of the participants would include a membership fee with the important proviso that smaller organizations, especially those organizations advancing the interests of equity-seeking groups might be exempted from such the requirement to contribute financially reflecting their limited capacity (VH). Others remarked that larger, well-endowed organizations could be invited to participate with the expectation that the size of their contribution reflected a readiness to share power and resources. There was also a very high level of agreement that the network would never be funded adequately with sole reliance on contributions from its members (VH).

Funding from charitable foundations with an interest in public policy and/or in building the capacity of the sector was seen as the single most promising source of funding for the network (VH).

Many found the notion of contributions from wealthy individuals also attractive with the caveat that this was not as easy a source to be tapped. As to contributions from corporations and governments, the views were more mixed (M). Many did not wish to receive those contributions in the early stages of the development of the network for fear that corporations and governments could seek to influence the purpose, values, or priorities of the network. Those who saw the potential for funding from corporations and governments when the network had reached maturity were unequivocal about the need for such funding to be consistent with the values of the network and negotiated without strings attached.

I probed respondents to understand the scale of financial resources required on a fully allocated basis (including the costs of staff loaned or employed by the host organization on behalf of the network) in the third year of its operation reflecting a time when the network would have achieved a level of maturity in its engagement, governance, and operations. Respondents strongly agreed that the network needed to be well resourced (VH), while some noted that the network should not be launched without confidence about its medium-term funding prospects. The responses ranged from an annual budget from

$300,000 to $1-2 million dollars, with most responses clustering in the $500,000 to $1 million range with the bulk of such resources dedicated to investments in human resources. Some respondents identified the need for additional funds beyond the core operations for activities such as large annual or bi-annual gatherings or broader marketing efforts to mobilize the public around key policy planks.

7. A WORD ABOUT TERMINOLOGY

In discussions, I used the word network to define the new structure but did so on a provisional basis conscious of the need to solicit views about purpose, activities, and structure before addressing the proper moniker for the initiative.

Respondents reflected agreement that the moniker network was very suitable for such an initiative reflecting a distributed and non-hierarchical approach to collaboration (VH).

I probed further as to the full name of an eventual network. Respondents reflected a clear preference for a descriptive brand name in place of more evocative, invented, or lexical brand names[7]. This preference reflects the strong desire to safeguard the independence of participants in the network while harnessing the visibility of individual organizations to deepen awareness of the sector. These preferences are consistent with an alliance marketing[8] strategy.

The more complex definitional issue arises in the meaning attributed to the word sector as used in this report to describe the charitable and nonprofit sector. I probed to understand how broadly respondents conceptualized the sector borrowing from the work of Lester M. Salamon at John Hopkins University in building a framework for comparative country case studies[9]. On an unaided basis some respondents focused their description of the sector as encompassing those rights-seeking and service organizations with a focus on JEDI. Others imagined the sector more broadly encompassing organizations in various sub-sectors (e.g., the environment, education, healthcare, religion, culture and recreation, philanthropic intermediaries). I probed further to understand the extent to which nonprofits might be invited or motivated to participate. There was muted

interest in attracting some public benefit nonprofits to the network and little or no interest in engaging with private benefit nonprofits. Similarly, those charities which are often characterized as quasi governmental organizations (Quangos) because of their proximity to, limited autonomy from, and significant reliance on funding from governments (e.g., universities, community colleges, hospitals, and public museums and art galleries) were conceptualized as part of the sector but not as a priority for engagement in this network. Many respondents commented that Quangos are relatively well connected to governments and might be interested in episodic collaborations with the network only.

I note that the breadth with which respondents conceptualized the sector correlates significantly with the way in which respondents framed the purpose either from an *instrumental* or *impact* lens as discussed earlier.

When prompted to discuss the place of unincorporated organizations (whether they are in the process of seeking incorporation or not) in conceptualizing the sector, there was agreement that the meaning ascribed to sector in designing a network should encompass such organizations. This reflects the high level of agreement about the need for the network to pro-actively attract and enable the participation of less formal organizations in its activities.

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[7] Imagine Canada is a good example of an evocative brand name. The problem with lexical or invented brand names is that they often have no inherent meaning when first invented. Krazy Glue is a good example of a lexical brand name.

[8] A good example of alliance marketing is available in Star Alliance which knits together marketing and international routing operations of major airline carriers. An alliance marketing strategy recognizes

that the brand assets of alliance members are more powerful than that of the alliance itself with the effect that the alliance brand is always subsidiary to the brand of its members.

[9] Hall, Michael H., Barr, Cathy W., Easwaramoorthy, M., Sokolowski, S. Wojciech, and Salamon, Lester M. *The Canadian Nonprofit and Voluntary Sector in Comparative Perspective*, Imagine Canada, Toronto, Canada (2005).

8. INCUBATION AND CONVENING

The appetite for greater impact on public policy is broadly shared. Respondents offered mixed views on fundamental aspects of the network design including its purpose. Mixed views are also reflected on which organizations might be best placed to host the administrative hub for such a network.

While there are high levels of agreement in certain areas, these are ancillary to the question of purpose. The important areas of divergence in the data complicate network steps.

A process of engagement and convening of a larger number of sector leaders is required to establish the legitimacy to make important choices. My hope is that the recommendations below will serve to illuminate those conversations without limiting their ambit.

Respondents did not agree on who might be best placed to convene such an engagement process (VL), yet many expressed a desire to see one implemented. This is a conundrum that should not deter sector leaders from launching a process of incubation to develop legitimacy, build excitement, and finalize blueprints for the possible launch of a network.

RECOMMENDATIONS

The following is a list of recommendations inspired from but not validated in conversation with the key informants. While I was not specifically tasked by Imagine Canada to do so, I have chosen to assemble a list of recommendations reflecting the level of excitement and appetite generated by the notion of new and more distributed ways of collaborating to amplify the impact of the sector in the public policy arena.

PURPOSE

1. The sector should design and build a new sectoral public policy network firmly rooted in progressive values of JEDI and which has as its purpose to build a world which is more just and sustainable by leveraging the sector's collective resources to influence public policy. Organizers should be deliberate in seeking to attract as broad a range of organizations as possible to participate in its work.

CONVENING AND INCUBATING

2. Two to three organizations (the co-conveners) should collaborate to seek funding to co-convene a sector-wide engagement process. Priority should be placed on obtaining funds from charitable foundations with an interest in sectoral capacity building and public policy.

3. Subject to such funding being confirmed, the co-conveners should organize sector-wide virtual engagement activities to develop blueprints and establish greater legitimacy for the network. Specifically, the engagement process should be designed to finalize the following: purposes and activities, name, values, membership model, governance and decision-making structures, and process and criteria for selecting the network's host.

4. At minimum one of the co-conveners should be an organization advancing the interests of equity-seeking groups. In selecting the co-conveners, interested organizations should be required to declare whether they will seek to host the administration of the network. At least one of the co-conveners should be excluded from competing to host the administration of the network.

5. Serious consideration should be given to having Imagine Canada involved in convening the engagement process.

6. The co-conveners should assemble a *pro tem* steering committee of 9-13 sector leaders reflecting the diversity of Canada to provide guidance to the engagement process.

7. Beyond the time required to confirm funding, this engagement process should extend over a period of 6 to 9 months.

8. The co-conveners should explore the appetite for and readiness to provide longer term funding on the part of a broader group of charitable foundations that have an interest in building the sector's capacity and/or their philanthropic intermediaries.

9. Imagine Canada and Carleton University should share the reports of their research projects on ways of working better together to impact public policy as a backdrop to this period of engagement. Consideration should be given to making the contents of those reports available in French.

IMAGINE CANADA

10. Imagine Canada should consider this report as part of its periodic exploration of future strategy options.

11. Imagine Canada should harness the learnings from hosting the Equitable Recovery Collective and should continue to deepen the application of a JEDI lens to its work.

12. Consideration ought to be given to whether the Equitable Recovery Collective is woven into a new network if one emerges.

The following recommendations should be considered in light of the results of the co-convening process and are therefore very preliminary.

LAUNCH

13. Plans for the Network should be made only with knowledge of interest of funders to provide stable and adequate resources for the first two years of the network's activities. Confidence that a minimum of $200,000 for the first full year of operations of the network and a further $150,000 for its second year (excluding membership fees, if any) ought to be high before launching the network.

14. The network's membership model should be one where both the members and the network have mutual accountabilities not solely based on financial contributions. The model should provide for a mechanism for smaller community-based organizations to be exempted from paying membership dues as may be necessary to ensure their participation while incenting larger, well-resourced organizations to make more significant contributions.

15. In naming the network, consider a descriptive brand name that encompasses the term "network". Apply alliance marketing principles in communicating the role of the network and the vital role played by its members.

STRUCTURE AND OPERATIONS

16. The network should not seek to be separately incorporated in the first two to three years of operations relying on a hosting arrangement for IT, HR, and accounting services. A hosting arrangement would be designed to accelerate the impact of the network on public policy.

17. A public and highly transparent process should be implemented to select the host of the network. The process should not preclude from consideration those proposals that might involve co-hosting arrangements.

18. The co-conveners of the engagement process which declared that it would not seek to host the network and is therefore excluded from seeking to do so should be tasked to organize this process.

19. Decision-making about the criteria for selection and the final choice of the hosting organizations should exclude those individuals on the board or staff of organizations applying to host the network. A public solicitation of proposals from potential hosting organizations should be communicated broadly throughout the sector.

20. A hosting arrangement should be for a period of three to five years with a review of said arrangement in its final year. This review should consider whether the network ought to be separately incorporated.

ABOUT THE AUTHOR

Yves Savoie is a strategic advisor to charities and philanthropists. His work builds on more than thirty years as an experienced health and human service executive leading large health and social service organizations in the social service, disability, and health promotion areas. He brings deep practical knowledge and experience to leading complex organizations which are evolving the ways in which they collaborate to increase impact and grow revenues.

He has a deep interest in the impact of technology on pro-social behaviors and on the changing meaning of 'local' community. Yves has familiarity with a broad range of areas including grant-making, public policy, fundraising, social finance and investment management, organizational transformation, and governance. Yves is a gay man whose experience of homophobia provides deep insights into issues of equity and inclusion.

He is a graduate of the University of Toronto, obtained his MBA at Concordia University, and later completed a Master of Management at McGill University.

Yves is passionate about the highest ethical standards in nonprofit management and fundraising. He is an Associate Member of the Association of Fundraising Professionals and subscribes to its Code of Ethical Standards and Donors Bill of Rights. Yves volunteers to build capacity in the nonprofit sector. He chairs Imagine Canada's Standards Program Council and serves on the Editorial Advisory Board of www.thephilanthropist.ca . Yves is the facilitator of the *Equitable Recovery Collective* hosted by Imagine Canada and a member of the board of *Confluence – Créateur de vocations*, formerly *The dancer transition resource center in Quebec* (CQRTD).

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CONVERSATION GUIDE
FOR KEY INFORMANT INTERVIEWS

Exploring Options for a Public Policy Network for Canada's Charitable and Nonprofit Sector

INTRODUCTION

I have been engaged by Imagine Canada to examine the idea of a Public Policy Network for the charitable and nonprofit sector. Note that I use network in a preliminary way and will return late to the appropriateness of this moniker.

Note that our conversation is confidential and that there will be no attributions. A list of acknowledgements only will appear in the final report.

Thank you for consenting to participate and to have this conversation recorded via Zoom.

Drawing on qualitative research methods, I will use semi-structured probes which will not limit my ability to delve more deeply in areas which you might surface.

Thank you for your participation.

QUESTIONS

Is such a proposed network a good idea? Would you have appetite to be involved?

What would you imagine the purpose(s) of such a Network to be?

- If one of its purposes were to develop common agenda for policy action, whose agenda would it be?

- If the network's purpose were a clearinghouse for information, do you accept that different actors around the table might pursue different agendas, with potentially conflicting priorities?

- As participants in the network, would organizations be expected to subsume their own policy and government funding priorities which they might seek to pursue separately?

- If you were at the network's table today and you were asked to identify your top three policy priorities, what would these be?

Who do you imagine as the participants or actors within such a network?

- How broad/narrow should the membership be?

- What is the commitment demanded/expected of members? What is the nature of the accountability in the other direction from the network to its members?

- Do you imagine both organizations and individuals as participants?

- If organizations are participants, do you imagine a single representative or not? At what level would such representation be? Are there other ways to define who should be at the table on behalf of organizations?How do you ensure diversity in the membership?

- How and to whom would you issue the invitation? Very broadly or narrowly?

- Should the network communicate to members or potential members in French and English?

- Are special efforts necessary to attract to network actors whose language of work is primarily French or that are primarily focused on Quebec or important francophone communities outside Quebec?

What type of governing or leadership structure do you imagine for such a network?

- How are its participants selected? How do you ensure diversity among those involved in the network's leadership?

- What is the role of the network's leadership structure? Please comment on decision style and norms?

- Do you imagine the network as having a time-limited purpose or a more perennial one?

- Do you imagine a need for a temporary or pro tem structure to provide leadership to the network's incubation or early development?

How do you envisage the administration of the network (e.g., website hosting, accounting, HR, etc.)?

- Should the network be separately incorporated or hosted by an organization which would provide those administrative services for a fee?

- Can you identify organizations which might play the role of host? What are key ingredients to success of such a hosting arrangement? How should a hosting organization be selected?

- When you imagine such a network, please comment on the risk of fragmenting or the opportunity to complement the work of other organizations involved in public policy.

- Please know that I have been asked explicitly by Imagine Canada to be agnostic as to their role in a network. My hope is that in my being explicit about this, you will feel free to comment specifically on Imagine Canada in such a hosting role or in any other connection with such a network.

How do you imagine the resourcing of such a network?

- Are there foundations, corporations who would be candidates for funding of such an initiative?

- Would you accept funding from governments/corporations? If so, how might this impact the network's ability to press governments for policy changes or the perception of its independence from corporate interests?

- Would members be invited or required to pay fees? How would such a requirement be compatible with the desire bringing to the table some actors which have less capacity to do so?

- Imagine the network has been operational for three years. On a fully allocated basis (i.e., staffing and all other administrative costs), what do you believe should be the annual budget for such a network?

Many have commented that our sector suffers from a visibility deficit both in government circles and among the general public. **Do you believe the sector has to remedy this visibility deficit to be effective advocates for policy change? Please comment on what might be the Network's role in building the visibility of the sector.**

I have used the word 'sector' repeatedly, please allow me to understand who you include in your definition of the sector.

Similarly, please comment on the appropriateness of the word 'network' which I have used without inviting precision about its meaning. Are there other monikers which would better reflect how you imagine such a collaboration?

As you imagine the network, please comment on whether it should have a descriptive name or a well branded and potentially more evocative name.

Now it's time to give you an opportunity to offer any insights which I have not probed.