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Special Issue: Crisis, Pandemic, and Beyond: Nonprofits and the Adaptive Capability of Communities

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GUEST EDITORIAL / ÉDITORIAL SPÉCIAL

Crisis, Pandemic, and Beyond: Nonprofits and the Adaptive Capability of Communities

Crise, pandémie, et après : les organismes sans but lucratif et la capacité d'adaptation des communautés

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Crises such as the COVID-19 pandemic, SARS, the global financial crisis, and natural disasters pose a seismic threat to the institutions of society. Unfolding at individual, organizational, and societal levels, crises cross sectoral boundaries, involving multiple institutions and a high volume of people and resources (Jarzabkowski, Bednarek, Chalkias, & Cacciatori, 2019). The global scale of these crises highlights their complexity in terms of the economic, social, political, and environmental impacts (Therrien, Normandin, & Denis, 2017). As discrete events and parts of larger processes, crises can be a function of the external environment but carry significant implications for organizations (Bundy, Pfarrer, Short, & Coombs, 2017). Posing large-scale challenges with a strong social, environmental, and economic component, crises encompass intractable, enduring problems (George, Howard-Grenville, & Joshi, 2016). Across local, regional, national, and global contexts, crises—due to their scale and severity—wreak havoc on communities and the health and well-being of people. Crises also threaten the nonprofit organizations that support the functioning of society. This special issue of the *Canadian*

Des crises telles que la pandémie du COVID-19, le SRAS, la crise financière mondiale et les désastres naturels posent une menace sismique aux institutions de la société. Se déroulant à des niveaux individuels, organisationnels et sociétaux, les crises dépassent les frontières sectorielles, impliquant des institutions multiples et un volume élevé de main-d'œuvre et de ressources (Jarzabkowski, Bednarek, Chalkias, et Cacciatori, 2019). L'envergure mondiale de certaines crises souligne leur complexité relative à leurs effets économiques, sociaux, politiques et environnementaux (Therrien, Normandin et Denis, 2017). En tant qu'événements individuels ou éléments de processus plus vastes, les crises, même quand elles sont une manifestation de l'environnement externe, entraînent des conséquences significatives pour toute organisation (Bundy, Pfarrer, Short et Coombs, 2017). Posant des défis sociaux, environnementaux et économiques à grande échelle, les crises peuvent causer des problèmes persistants qui sont difficiles à résoudre (George, Howard-Grenville et Joshi, 2016). Traversant les contextes locaux, régionaux, nationaux et mondiaux, les crises, à cause de leur envergure et de leur sévérité, perturbent les communautés ainsi que la santé et le bien-être indi-

Journal of Nonprofit and Social Economy Research (ANSERJ) explores the multidimensional impacts of a crisis on nonprofit organizations, their employees, and clients.

Similar to previous crises but at a significantly higher level, nonprofit organizations in social and community sectors have been called on to lead the response to COVID-19. As countries weighed the devastating impacts of COVID-19 and rolled out different relief and stimulus programs, nonprofit organizations continued to provide urgent assistance to the vulnerable members of communities, such as the elderly and those living in poverty. The unprecedented pandemic draws into sharp relief the heightened problem-solving role that nonprofit organizations play in attending to the immediate needs of the vulnerable population and extending their services while exemplifying their mission and values without the opportunity to plan. As crises occur without warning, nonprofit organizations find themselves working with other organizations in the health or public services sector under extreme circumstances, often with little experience of coordinating a joint response (Cigler, 2007).

Nonprofit organizations are navigating and adapting to a short- and long-term crisis environment characterized by certain change with unimaginable unpredictability (Imagine Canada, 2020). Reports from the U.S., Canada, and the U.K. are already raising concerns that COVID-19 has exacerbated the perennial challenges that nonprofits face such as funding and meeting emergent demand. This is despite the relief programs of national, regional, and local governments, which have given unprecedented sums of money to provide financial assistance to national economies and to protect their respective nonprofit sectors from the worst effects of the pandemic and the accompanying economic crisis. While nonprofit organizations are finding ways to meet the significant upsurge in demand for service and innovate their modes of service delivery, their resilience and sustainability remain under serious financial threat. In Canada, for example, one survey found that 54 percent of chari-

viduels. Les crises menacent aussi les organismes sans but lucratif (OSBL) qui contribuent au fonctionnement de la société. Ce numéro spécial de la *Revue canadienne de recherche sur les OSBL et l'économie sociale* (ANSERJ) explore les impacts multidimensionnels des crises sur les OSBL, leurs employés et leurs clients.

Comme lors de crises antérieures mais avec une intensité accrue, les OSBL des secteurs sociaux et communautaires ont dû assumer la responsabilité de formuler une réponse au COVID-19. En effet, pendant que les divers pays du monde évaluaient les effets dévastateurs du COVID-19 et développaient des programmes de secours et de stimulus, les OSBL ont dû continuer à fournir une aide urgente aux membres les plus vulnérables de la société tels que les aînés et les pauvres. Cette pandémie sans précédent a mis en relief le rôle essentiel de solutionneur de problèmes joué par les OSBL qui, tout en respectant leur mission et leurs valeurs, devaient répondre aux besoins immédiats des populations vulnérables en leur offrant des services essentiels sans le loisir de pouvoir planifier un mode opératoire. En effet, comme les crises surviennent sans préavis, les OSBL se retrouvent à collaborer dans des conditions extrêmes avec d'autres organismes des secteurs de la santé et des services publics ayant souvent peu d'expérience pour coordonner une intervention commune (Cigler, 2007).

Actuellement, les OSBL se voient contraints de s'adapter à une crise à court et à long terme et à la gérer dans un contexte de changements inéluctables et d'imprévisibilité inimaginable (Imagine Canada, 2020). Des rapports provenant des États-Unis, du Canada et du Royaume-Uni soulèvent déjà des inquiétudes du fait que le COVID-19 a aggravé les défis constants auxquels les OSBL doivent faire face en ce qui a trait à leur financement et leur capacité à répondre aux besoins des populations qu'ils aident. Cette situation existe malgré des programmes de secours offerts par les gouvernements nationaux, régionaux et locaux, qui ont fourni des sommes d'argent sans précédent afin d'appuyer les économies nationales et protéger le secteur à but non lucratif contre les ravages de la pandémie et de la crise économique provoquée par celle-ci. Pendant que les OSBL cherchent des moyens de répondre à une demande de services qui a augmenté de manière importante et d'innover dans leur offre de services, des défis financiers posent une menace sérieuse à

ties transitioned their services online, which highlights a unique challenge for many nonprofits due to a lack of resources, training, and legislation on the delivery of human services in sensitive areas such as mental health (Jansen, 2020). Importantly, there are indications that the various government relief programs cannot sustain the sector with 65 percent of nonprofits in an Ontario survey indicating that they did not benefit from any federal assistance and 75 percent indicating the same for provincial assistance (Doherty, 2020). In the U.K., despite receiving targeted government funds and benefits during COVID-19, 84 percent of nonprofits in Scotland reported financial problems in 2020 and 20 percent foresaw a critical impact on their finances at some point within the next 12 months (Office of the Scottish Charity Regulator [OSCR], 2020a). A follow-up OSCR (2020b) report found that nearly all (96%) of surveyed nonprofits in Scotland had their staffing or administration process affected, and 75 percent had seen an impact on their finances by COVID-19.

Questions about the impacts of crises on nonprofit organizations are complex and multidisciplinary, requiring new knowledge and a better understanding of the potentially system-wide disruptive nature of crisis. Characterized as sources of uncertainty, disruption, and change, crises are harmful or threatening for organizations and their diverse stakeholders (Bundy et al., 2017). The duration of a crisis such as the pandemic calls for attention to the implications of economic downturn and organizational imperatives for nonprofit services, management, governance, employment relations, and fundraising, etc. These questions are not only important in the analysis of the immediate and short-term impacts of crises but they are also likely to signal the direction of longer-term issues for nonprofit organizations.

This special issue seeks to provide a better empirical and conceptual understanding of the nature, scope, and dimensions of the impacts of crisis in the field of nonprofit research. It brings together diverse perspectives

leur résilience et leur viabilité. Au Canada, par exemple, un sondage révèle que 54% des œuvres de bienfaisance ont modifié leurs services afin de les offrir en ligne, situation qui souligne un défi singulier pour plusieurs OSBL causé par un manque de ressources, de formation, et de législation sur l'offre de services pour particuliers dans des domaines sensibles tels que la santé mentale (Jansen, 2020). Notamment, il y a des signes que les divers programmes de secours gouvernementaux ont été insuffisants pour soutenir le secteur, avec 65% des OSBL indiquant dans un sondage ontarien qu'ils n'ont bénéficié d'aucune assistance fédérale et 75% répondant de même pour l'assistance provinciale (Doherty, 2020). Au Royaume-Uni, malgré le fait qu'ils aient reçu des fonds et des bénéfices ciblés de la part du gouvernement pendant le COVID-19, 84% des OSBL en Écosse ont indiqué éprouver des problèmes financiers en 2020 et 20% s'attendaient à en éprouver dans les douze mois à venir (Office of the Scottish Charity Regulator [OSCR], 2020a). Un suivi de la part d'OSCR (2020b) a constaté que presque tous les OSBL écossais sondés (c'est-à-dire 96% d'entre eux) ont subi des conséquences négatives sur leur personnel ou sur leur processus administratif, et 75% d'entre eux ont indiqué que le COVID-19 a eu des répercussions sur leurs finances.

Les problèmes soulevés par l'impact des crises sur les OSBL sont complexes et multidisciplinaires. Ils nécessitent de nouveaux savoirs et une meilleure compréhension du potentiel qu'a une crise d'ébranler un système dans son intégralité. Les crises, perçues comme sources d'incertitude, de perturbation et de changement, sont nocives ou menaçantes pour les organismes et leurs diverses parties prenantes (Bundy et al., 2017). La durée d'une crise comme la pandémie requiert que l'on prenne conscience des effets d'un ralentissement économique sur les OSBL ainsi que d'impératifs organisationnels relatifs aux services, à la gestion, à la gouvernance, aux rapports avec le personnel, aux levées de fonds, et ainsi de suite. Cette prise de conscience par les OSBL est non seulement importante pour analyser les effets immédiats et à court terme des crises mais aussi pour mieux comprendre leurs effets à long terme.

Ce numéro spécial cherche à donner une meilleure compréhension empirique et conceptuelle de la nature, l'envergure et les dimensions des effets des crises sur la recherche portant sur les OSBL. Ce numéro rassemble diverses perspec-

on how crisis shapes the management practices, processes, resources, and capabilities of nonprofit organizations as well as their relationships with the state, local governments, partnerships, and communities.

Crisis and the nonprofit workforce

The impact of crisis portends serious strains to the already challenged work context of employees in nonprofit organizations. The understanding of the characteristics of nonprofit work has changed in recent years from a relatively harmonious employment relationship characterized by high commitment and reciprocity, with participatory practices providing enriching work (Cunningham, 2008). A combination of distinctive features of nonprofit work, although not exclusive to the sector, brings added complexity, uncertainty, and vulnerability to those engaged in nonprofit work in the social and community sectors. The first notable characteristic is that nonprofit work is gendered, with women constituting an overwhelming majority of the workforce. As a result of the dynamics of asymmetrical power relations, market and managerial relations of conflict and consent will largely concern a female-dominated workforce (Baines & Cunningham, 2020). In addition, as a sector that relies heavily on the intrinsic motivations of the workforce (Baluch, 2017), nonprofit organizations may be exploiting the commitment of their employees, particularly the female capacity for seemingly endless care. Employees in nonprofits traditionally face further complications regarding the role of public funding bodies as a “shadow” employer in the employment relationship. Public purchasers have significant influence on market relations between nonprofits and their employees, and, therefore, pay (Cunningham & James, 2017). Research suggests that the continual efficiency calls by public service funders has led to a steady deterioration in working conditions, including pay, pensions, sickness absence entitlements and other benefits (Cunningham, 2008).

These distinctive characteristics of nonprofit work raise concerns relating to how work, employment relationships, and employees may be affected in the context of

tives sur la manière dont les crises orientent les pratiques, processus, ressources et capacités en gestion des OSBL ainsi que les rapports de ces derniers avec l'État, les gouvernements locaux, les partenaires et les communautés.

Les crises et le personnel des OSBL

Pour les employés d'OSBL, les crises peuvent aggraver une situation qui s'avère déjà difficile. Depuis quelque temps, la manière d'envisager le travail à but non lucratif a changé, dans un contexte où une réciprocité et un engagement étroits, y compris des pratiques de participation enrichissantes, avaient caractérisé des relations de travail relativement harmonieuses (Cunningham, 2008). De nos jours, le travail pour les OSBL comporte des caractéristiques qui, bien qu'elles ne soient pas limitées au secteur, entraînent un niveau hors mesure de complexité, d'incertitude et de vulnérabilité pour ceux et celles qui œuvrent dans les secteurs sociaux et communautaires. La première caractéristique à noter est que le travail des OSBL est genré, dans la mesure où ce sont les femmes qui constituent la grande majorité de la main-d'œuvre. Dans un milieu où les relations de pouvoir sont asymétriques, des rapports de marché et de gestion où prédominent le conflit et le consentement exerceront une influence certaine sur une main-d'œuvre à prépondérance féminine (Baines et Cunningham, 2020). En outre, en tant qu'organismes qui dépendent de la motivation intrinsèque de leurs employés (Baluch, 2017), les OSBL sont peut-être en train d'exploiter outre mesure l'engagement de leur personnel, particulièrement la capacité prétendument inépuisable des femmes à promulguer des soins. D'autre part, les employés d'OSBL ont traditionnellement fait face à des complications additionnelles relatives au rôle d'employeur caché que jouent les organismes de financement publics dans leurs relations avec le personnel des OSBL. En outre, les acheteurs publics exercent une influence prononcée sur les interactions financières entre les OSBL, leurs employés et le revenu de ces derniers (Cunningham et James, 2017). La recherche suggère que les demandes incessantes d'efficacité par les organismes de financement publics ont mené à une détérioration des conditions de travail pour ce qui est des salaires, des pensions et des prestations de maladie, entre autres (Cunningham, 2008).

Les caractéristiques distinctes du travail dans les OSBL provoquent des questionnements sur la manière dont une crise peut influencer le travail, les rapports entre employés, et les

crisis. Research exploring the sector's reaction to 2008 financial crash reveals governments across developed economies called for austerity in public funding. As a result, state-nonprofit relations were characterized by the former requiring more savings and efficiencies from the latter. Funders continued to have a negative influence on the employment experience of nonprofit workers, with tighter performance management, demands for the same services with considerably fewer resources, and greater job insecurity and work intensification (Cunningham & James, 2014). Efforts to counter the deterioration in employment conditions during austerity proved difficult for nonprofit employees. Austerity led to management becoming intolerant of individual worker grievances about workload demands, blaming individual worker shortcomings rather than the organization or the externally imposed workload (Baines, Cunningham, & Shields, 2017).

Already the experience of working during the pandemic has heightened concerns regarding the health and safety of the nonprofit workforce, raised the personal (and societal) risks associated with contractual insecurity and the shortage of working hours, exacerbated longer-term concerns over low pay and income insecurity while sick, and intensified fears of job losses. In Canada, over 30 percent of Canadian nonprofit organizations have laid off staff while 55 percent indicated that they are likely to have new or additional layoffs (Lasby, 2020). In the U.S., reports highlight the detrimental impacts of the pandemic, linking increased health and mental health issues, especially for nurses, with a myriad of workplace issues, including longer shifts, larger workloads, and nurses initially having to use their own sick leave, vacation, or other paid leave if they get COVID-19 or were exposed to the virus (National Nurses United, 2020). Similarly in the U.K., reports from the frontline indicate the detrimental impact of the pandemic on the nature of social care provision and the subsequent safety of workers, alongside increasing work demands from COVID-19-related restrictions on a low-pay workforce

employés eux-mêmes. La recherche sur la manière dont le secteur a réagi face à la crise économique de 2008 montre à quel point les gouvernements des pays développés ont voulu imposer des mesures d'austérité sur le financement public. À ce titre, dans les relations entre l'État et les OSBL, les premiers ont demandé aux derniers qu'ils fassent davantage d'économies et deviennent plus efficaces. Ainsi, les organismes de financement gouvernementaux ont eu un effet négatif sur le vécu des employés d'OSBL, imposant à ces derniers une gestion de la performance plus serrée, une exigence qu'un niveau équivalent de services soit fourni avec moins de ressources, une plus grande insécurité d'emploi, et une intensification du travail (Cunningham et James, 2014). D'autre part, il a été très difficile pour les employés d'OSBL en pleine période d'austérité de s'opposer à la détérioration de leurs conditions de travail. En effet, l'austérité a fait en sorte que la direction a commencé à manquer de patience envers les griefs sur la surcharge de travail provenant d'employés individuels. La direction a eu tendance à en vouloir à ces travailleurs individuels plutôt qu'à l'organisation elle-même ou à des facteurs externes (Baines, Cunningham et Shields, 2017).

Déjà, pour les employés d'OSBL, les expériences de travail pendant la pandémie ont augmenté leurs inquiétudes par rapport à la santé et la sécurité, leurs risques personnels (et sociaux) relatifs au travail à la tâche et aux heures de travail insuffisants, leurs soucis à plus long terme par rapport à leurs salaires trop bas ou à leur insécurité salariale en cas de maladie, et leurs craintes de perdre leur emploi. À ce titre, plus de 30% des OSBL au Canada ont mis à pied des employés tandis que 55% des OSBL ont indiqué qu'ils seraient obligés d'effectuer des mises à pied dans un proche avenir, que ce soit pour la première fois ou non (Lasby, 2020). Aux États-Unis, certains rapports ont souligné les effets délétères de la pandémie, associant un accroissement de problèmes de santé physique et mentale, surtout parmi les infirmiers et les infirmières, à une panoplie de problèmes au travail, y compris des charges accrues et de plus longs quarts de travail. En outre, les infirmiers et les infirmières devaient à l'origine recourir à leurs propres congés de maladie, vacances et autres congés payés s'ils avaient été exposés au virus ou s'ils contractaient carrément le COVID-19 (National Nurses United, 2020). De même, au Royaume-Uni, des comptes rendus provenant des premières lignes ont souligné l'impact négatif de

(Cunningham, Baluch, & James, 2020). In terms of job security among nonprofit workers, limited priority is being given to the role, funding, and recovery of nonprofits in some national reconstruction plans. Furthermore, future recovery and investment plans are skewed toward male-dominated sectors, which have the potential to create unequal outcomes for men and women and exacerbate existing inequalities (House of Commons Women and Equalities Committee, 2021).

Crisis: Introducing the special issue

Drawing on diverse perspectives on the impact of COVID-19 and the responses of nonprofit organizations and communities, this special issue examines a range of topics, including funding distribution changes within the Canadian philanthropic sector, the innovative community mobilization of social capital in Québec, collaborative efforts in Western Canada to build inclusive economies, and adaptive capabilities harnessed by French grassroots volunteer organizations to maintain essential community services in the face of crisis.

The first article, authored by **Adam Saifer, Isidora G. Sidorovska, Manuel Litalien, Jean-Marc Fontan, and Charles Duprez** captures the policy, practice, and program changes within Canadian grantmaking foundations, thereby contributing to our understanding of immediate responses to the pandemic from Canada's philanthropic sector. Using existing qualitative datasets and semi-structured interviews, the authors uncover tensions in pre-COVID-19 practices, including top-down control versus greater accountability, societal versus legal obligations of philanthropic giving, and short-term charitable approaches versus longer-term attempts to alter structural inequities. Adaptive responses to the rapidly changing community impacts during the pandemic include increased spending flexibility; modified funding application and reporting; collaborative programs among funders, community partners, and government at scale; responsive programming focused on “non-qualified donees”;

la pandémie sur l'offre de services sociaux et sur la sécurité des travailleurs. Les restrictions relatives au COVID-19 ont mené à de plus grandes exigences de travail pour une main-d'œuvre qui était déjà sous-rémunérée pour ce qu'elle faisait (Cunningham, Baluch et James, 2020). Quant à la sécurité d'emploi pour les travailleurs d'OSBL, certains projets de reconstruction nationale ont négligé de reconnaître le rôle, le financement et le rétablissement des OSBL. En outre, les plans de reprise et d'investissement ont tendu à mettre l'accent sur des secteurs à prédominance mâle, avec le potentiel de créer des résultats inégaux entre hommes et femmes, augmentant ainsi les inégalités existantes (House of Commons Women and Equalities Committee, 2021).

Crise : présentation de ce numéro spécial

Ce numéro spécial présente diverses perspectives sur l'impact du COVID-19 et la réaction des OSBL et des communautés face à la pandémie. Ce faisant, il examine un éventail de sujets, y compris les changements dans la manière dont les fonds sont distribués dans le secteur philanthropique canadien, la mobilisation communautaire innovatrice du capital social au Québec, les efforts de collaboration dans l'Ouest canadien afin de créer une économie inclusive et, pour des organismes bénévoles français en pleine crise, le potentiel de la base de modifier ses pratiques afin de préserver l'offre de services communautaires essentiels.

Le premier article, d'**Adam Saifer, Isidora G. Sidorovska, Manuel Litalien, Jean-Marc Fontan, et Charles Duprez** recense les changements de politiques, de pratiques et de programmes dans les organismes de financement canadiens. Il contribue ainsi à notre compréhension de la manière dont le secteur philanthropique au Canada a géré la pandémie dans l'immédiat. En recourant à des données qualitatives existantes et à des interviews semi-structurées, les auteurs relèvent certaines tensions dans des pratiques précédant le COVID-19, par exemple entre un contrôle descendant et une plus grande responsabilisation, entre avoir des obligations philanthropiques sociales et avoir des obligations philanthropiques légales, et entre des approches caritatives à court terme et des tentatives de modifier les inégalités structurelles à long terme. Les solutions proposées pendant la pandémie pour s'adapter à des impacts communautaires en changement perpétuel ont inclus : une flexibilité accrue pour les dépenses; une modification des méthodes pour demander et rendre compte des subventions;

and the acknowledgement of immediate community needs and funding access inequities. The authors argue that the resultant philanthropic model is more democratic, reflecting institutional and structural reforms that encourage effective functionality and greater policy influence by the Canadian philanthropic sector.

In the second article, **Diane Alalouf-Hall** and **David Grant-Poitras** explore the impact of COVID-19 on the economic, social, and political function of volunteer activity and how the crisis has reworked meanings and practices of solidarity, mutual aid, and generosity within the Québec voluntary sector. Through a qualitative study of volunteer sector organizations, the authors shed light on organizational operations and volunteer activity during COVID-19, the integration and retention of volunteers, and the health-centric rationality in the structuring of volunteer work. Their research identifies the emergence of a new societal configuration within which voluntary action is institutionally and politically framed to carry out its fundamental functions differently. In doing so, we gain new knowledge of the rapid response and restructuring of Québec's mature volunteer sector.

In the third article, **Bethan Kingsley**, **Kirstyn Morley**, **Surma Das**, **Maria Mayan**, and **Emma Wallace** turn our attention to the underlying economic and social systems that shape wealth inequities exacerbated by COVID-19 and posit a more inclusive economic approach to poverty reduction. In acknowledging the pre-pandemic existence of societal inequalities, the authors share their research on Canada's social economy as a means of framing wider debates on more equitable wealth distribution. They discuss the creation of a community-university partnership with municipal government aimed at securing basic financial security through collaborative activities in employment and training, social procurement and community benefit agreements, living wages, and basic income. Preliminary lessons highlight the

des programmes collaboratifs d'égal à égal entre les organismes de financement, les partenaires communautaires et le gouvernement; une programmation sensible axée sur les « bénéficiaires non-qualifiés »; et la reconnaissance d'iniquités et de besoins communautaires immédiats dans l'accès aux subventions. Les auteurs soutiennent que le modèle philanthropique qui résulte de telles mesures serait plus démocratique, reflétant des réformes institutionnelles et structurelles encourageant une meilleure fonctionnalité et une plus grande influence du secteur philanthropique canadien sur la formulation de politiques.

Dans le deuxième article, **Diane Alalouf-Hall** et **David Grant-Poitras** explorent l'impact du COVID-19 sur les fonctions économiques, sociales et politiques du bénévolat et la manière dont la crise a changé le sens et la pratique de la solidarité, de l'aide mutuelle et de la générosité dans le secteur bénévole au Québec. Par l'entremise d'une étude qualitative d'organismes de bénévolat, les auteurs examinent les opérations organisationnelles et les activités bénévoles pendant le COVID-19, l'intégration et la rétention de bénévoles, et la rationalité centrée sur la santé dans la structuration du travail bénévole. Leur recherche identifie l'émergence d'une nouvelle configuration sociétale encadrant institutionnellement et politiquement l'action bénévole afin que celle-ci puisse remplir ses fonctions d'une nouvelle manière. Grâce à cet article, le lecteur peut acquérir de nouveaux savoirs sur la réponse rapide du secteur bénévole mature au Québec ainsi que sur sa restructuration.

Dans le troisième article, **Bethan Kingsley**, **Kristyn Morley**, **Surma Das**, **Maria Mayan** et **Emma Wallace** attirent l'attention du lecteur sur les systèmes économiques et sociaux qui sous-tendent les inégalités de richesse exacerbées par le COVID-19 et proposent une approche économique plus inclusive envers la réduction de la pauvreté. Tout en reconnaissant l'existence pré-pandémique d'inégalités sociales, les auteures partagent leurs recherches sur l'économie sociale canadienne dans le but de susciter un débat plus large sur comment distribuer la richesse de manière plus équitable. Elles discutent de la création d'un partenariat entre l'université, la communauté et le gouvernement municipal visant à assurer une sécurité financière de base au moyen de collaborations sur l'emploi et la formation, d'accords sur l'approvisionnement social et sur les bénéfices communautaires, de

transformative role that cities play in charting a path to an inclusive economy and the challenges faced in balancing idealism versus pragmatism in pursuing a redistributive economic model.

The fourth article, by **Guillaume Plaisance**, offers a French perspective through the eyes of grassroots volunteer organizations (GVOs) that, as a key voice for stakeholder communities, hold an influential role in social policy. Changing patterns of resource availability shape our understanding of coping mechanisms during the pandemic. Notably, the study creates a large-scale database of over 20,000 GVO leaders across 11 sectors (charity, social action, health, advocacy, leisure, education, sports, culture, economy, local, and environment) to address questions related to organizational functioning, evolving social roles, and the economic impacts of the crisis. Through shifts to online programming, adaptive working conditions, and volunteer contact, French GVOs demonstrate valiant efforts to respond to societal needs while maintaining community relationships despite severe resource limitations. Plaisance provides valuable insights into resource dependence across a wide spectrum of French nonprofit organizations through the perspective of GVO leadership.

Three practitioner perspectives complement the set of research articles to offer the frontline experience of COVID-19 and its impacts on nonprofit organizations across North America. **Salewa Olawoye-Mann** considers the Canadian nonprofit environment and the scope of responsive change across the sector. This piece also discusses the short-term reactive strategies of moving services and organizational systems online and how receiving temporary emergency support encourages nonprofits to develop longer-term strategies to meet expected increased demand for services. Olawoye-Mann further highlights how the longer-term strategies to rebuild an efficient workforce, job rotation, and training

salaires de subsistance et de revenus de base. Des leçons préliminaires provenant de cette recherche ont trait au rôle transformateur que les villes pourraient jouer en s'avancant vers une économie plus inclusive et aux défis présentés par le besoin d'établir un équilibre entre idéalisme et pragmatisme dans la création d'un modèle économique équitable.

Le quatrième article, par **Guillaume Plaisance**, offre une perspective française sur les organismes de bénévolat populaires qui, comme porte-paroles clés des communautés qu'ils servent, jouent un rôle influent dans la formulation de politiques sociales. Lors de la pandémie, des modifications dans la disponibilité de ressources ont eu un impact sur notre compréhension des stratégies d'adaptation possibles. Notamment, l'étude de l'auteur présente une vaste base de données recensant plus de 20 000 leaders d'organismes de bénévolat populaires dans onze secteurs (bienfaisance, action sociale, santé, plaidoyer, loisirs, éducation, sports, culture, économie, niveau local, et environnement) afin de traiter de questions relatives au fonctionnement des organismes de bénévolat, à leurs rôles sociaux en pleine évolution, et à l'impact économique que la crise a eu sur eux. Au moyen de changements dans la programmation en ligne, d'adaptations des conditions de travail, et de contacts avec les bénévoles, les organismes de bénévolat populaires, malgré leurs ressources insuffisantes, ont fait de vaillants efforts pour répondre aux besoins de leurs communautés tout en maintenant de bonnes relations sociales. En examinant la perspective des dirigeants d'organismes de bénévolat populaires, Plaisance offre un précieux aperçu de la dépendance envers les ressources éprouvée par un vaste éventail d'OSBL français.

Trois perspectives provenant de praticiens sur le terrain viennent compléter les quatre articles de recherche en présentant des expériences de première ligne relatives au COVID-19 et son impact sur les OSBL partout en Amérique du Nord. Dans le premier des trois textes, **Salewa Olawoye-Mann** considère le contexte pour les OSBL canadiens et la portée des adaptations dans le secteur. En outre, elle décrit les réactions stratégiques à court terme consistant à déplacer en ligne les systèmes et services organisationnels. Elle examine aussi comment les OSBL, ayant reçu un soutien d'urgence temporaire, ont eu la motivation de développer des stratégies à plus long terme afin de rencontrer une demande de services accrue. De plus, l'auteure souligne comment ces

address worker impacts while online communication contributes to issues of technological readiness and fundraising. Documenting the lessons learned in time of crisis facilitates knowledge sharing and enhances organizational preparedness.

Sean Stevens-Fabry provides a first-hand reflection from the frontlines of a free health clinic in Wisconsin, U.S., shedding light on the free clinic model and its adaptive processes in the context of the pandemic. The free clinic model provides behavioural health, social work, medical, pharmacy, and dental services to those least able to access health services. The article draws the reader's attention to the challenges—such as maintaining communication with patients and staff, the loss of volunteer practitioners, and preserving employee relations—highlighting the importance of a strong organizational culture for effective crisis response. Recognizing its unique characteristics and flexibility, the clinic's experiences offer key insights on organizational mission that are relevant across sectors.

Cathy Barr and **Bernadette Johnson** offer an overview of the emergent advocacy efforts to direct the attention of government to the needs of nonprofits during and beyond COVID-19. They explain that the unanticipated and incapacitating challenges of the COVID-19 pandemic compelled nonprofits in Canada to form coalitions overnight to seek government support and collaboration with the sector. From having to shift program and service priorities, adopt to remote work immediately, and cancel critical fundraising activities, nonprofit leaders recognized the threats of the pandemic to the survival of their organizations. Barr and Johnson note that the advocacy resulted in relative success, especially in terms of policy outcomes. It has helped to increase awareness of the role and challenges of nonprofits among policymakers. The advocacy of nonprofit sector coalitions opened policy opportunities that could improve the goals of the sector.

stratégies à plus long terme pour rétablir l'efficacité de la main-d'œuvre, la rotation d'emplois et la formation ont permis aux OSBL de mieux gérer les effets de la pandémie sur leurs employés tandis que la communication en ligne leur a permis de résoudre des problèmes de préparation technologique et de levées de fonds. Prendre note des leçons apprises en temps de crise facilite le partage du savoir et améliore la préparation organisationnelle.

Sean Stevens-Fabry offre quant à lui une réflexion personnelle de première ligne sur une clinique de santé gratuite au Wisconsin. Ce faisant, il explique le modèle de clinique gratuite et les processus d'adaptation de celle-ci face à la pandémie. La clinique gratuite fournit des services de santé comportementale, de travail social, et d'aide médicale, pharmaceutique et dentaire à ceux et celles qui sont les moins capables d'accéder aux soins de santé. Cet article attire l'attention du lecteur sur les défis que la clinique gratuite doit relever, y compris le maintien des communications avec les patients et le personnel, la rétention de bénévoles, et la préservation de bonnes relations avec les employés. L'article souligne en outre l'importance de maintenir une forte culture organisationnelle afin de bien réagir aux crises. Cette clinique du Wisconsin, vu ses caractéristiques et sa flexibilité singulières, donne un aperçu sur une mission organisationnelle qui pourrait inspirer une diversité de secteurs.

Dans leur article, **Cathy Barr** et **Bernadette Johnson** rendent compte d'efforts récents de la part de groupes de pression pour attirer l'attention des gouvernements sur les besoins des OSBL pendant et après le COVID-19. Les auteures expliquent que les défis non-anticipés et incapacitants de la pandémie ont contraint les OSBL au Canada de former à la hâte des coalitions dont l'objectif a été d'obtenir que le gouvernement appuie le secteur et collabore avec celui-ci. Les dirigeants d'OSBL, forcés à ajuster leurs priorités pour leurs programmes et services, s'adapter sans préavis au travail à distance et annuler des levées de fonds critiques, ont vite reconnu que la pandémie menaçait la survie de leurs organisations. Barr et Johnson remarquent que les demandes de la part des coalitions ont rencontré un succès relatif, surtout en ce qui a trait à la formulation de politiques. En effet, ces demandes ont contribué à conscientiser les stratégies gouvernementales sur le rôle et les défis des OSBL. Ainsi, le travail des coalitions du secteur sans but lucratif a créé un meilleur

contexte pour développer des politiques qui pourraient aider les OSBL à mieux atteindre leurs objectifs.

Conclusion

Taken together, these four research articles and three practitioner perspectives offer valuable insights that contribute to our understanding of how crises such as the global COVID-19 pandemic play out in the context of nonprofit organizations and the communities they serve. This special issue highlights the lessons that can be drawn from crises in terms of flexible adaptive organizational responses, the changing social phenomenon of volunteering, building inclusive economies, and the maintenance of community relations. Not only were nonprofit organizations required to lead the response to COVID-19 but they also had to adapt in managing key stakeholders and facilitating policy, practice, and program changes. The challenges outlined in this set of articles resonate with wider debates of social justice, community empowerment, wealth inequality, adaptability, and resilience and further heighten the need to address social and economic inequities, which are exacerbated by the pandemic and other crises. We anticipate that this examination of the multidimensional impacts of crises on nonprofit organizations will provide a relevant platform for further research on the nature, scope, and impacts of crisis on nonprofits.

Conclusion

Considérés dans leur ensemble, ces quatre articles de recherche et ces trois comptes rendus de praticiens sur le terrain offrent un aperçu important qui contribue à notre compréhension de la manière dont des crises comme la pandémie mondiale du COVID-19 influencent les OSBL et les communautés que ceux-ci servent. Ce numéro spécial souligne les leçons que l'on peut tirer à partir de crises pour ce qui est de réponses organisationnelles flexibles et adaptatives, de ce phénomène social en pleine évolution qu'est le bénévolat, de la création d'économies inclusives, et du maintien de bonnes relations communautaires. Non seulement les OSBL doivent-ils diriger la réponse au COVID-19, ils doivent aussi s'adapter pour modifier leurs politiques, leurs pratiques et leurs programmes et bien gérer les parties prenantes. D'autre part, les défis recensés dans ce recueil d'articles rejoignent des débats plus larges sur la justice sociale, l'autonomisation des communautés, les inégalités de richesse, l'adaptabilité et la résilience. De plus, ces défis font reconnaître encore plus combien il est nécessaire de bien gérer les inégalités sociales et économiques, lesquelles ont certainement été aggravées par la pandémie ainsi que par des crises connexes. Nous espérons que cet examen des impacts multidimensionnels des crises sur les OSBL offrira une base pertinente pour effectuer des recherches additionnelles sur la nature, la portée et l'impact des crises touchant le secteur à but non lucratif.

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Examining the COVID-19 Response of Canadian Grantmaking Foundations: Possibilities, Tensions, and Long-Term Implications

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ABSTRACT

This article explores how Canadian philanthropic foundations with social justice mandates responded to the social and economic impacts of the COVID-19 pandemic by loosening restrictions for grantees; collaborating on new initiatives; elevating grassroots knowledge; and balancing short- and long-term priorities. This response, however, revealed a series of tensions in the dominant pre-COVID-19 philanthropic model—specifically, as a mechanism to address the social, economic, and ecological crises that predate COVID-19. The early pandemic response of grantmaking foundations can therefore serve as a model for what a more democratic, agile, collaborative, and justice-oriented philanthropic sector can look like.

RÉSUMÉ

Cet article examine la réponse de fondations philanthropiques canadiennes aux enjeux de justice sociale pendant la pandémie de COVID-19. Elles l'ont fait en assouplissant les exigences exigées aux donataires; en collaborant autour de nouvelles initiatives; en priorisant l'expertise des communautés; et en équilibrant les priorités à long et à court terme. Cette réponse révèle les tensions inhérentes au modèle classique de l'action philanthropique, particulièrement dans les façons de répondre aux crises sociales, économiques et écologiques. La réponse actuelle fournit des bases solides pour repenser le modèle d'action du secteur philanthropique subventionnaire afin qu'il soit plus démocratique, plus collaboratif et plus axé sur la justice.

Keywords / Mot clés : Grantmaking foundations; COVID-19; Canadian philanthropic sector; Equity and social justice; Organizational change / Fondations subventionnaires; COVID-19; Secteur philanthropique canadien; Équité et justice sociale; Changement organisationnel



INTRODUCTION

In the early days of the COVID-19 pandemic, Canada plunged into a deep socio-economic crisis. Following a series of provincially mandated lockdowns, as well as the reduction of economic and social activities to core “essential services,” unemployment and social assistance rates soared while key socio-economic indicators plummeted. Unlike during the Great Depression of the 1930s, however, the magnitude of the crisis was mitigated by a range of interventions by public legislators at all levels of government. Federal, provincial, and territorial governments directly injected billions of dollars into support measures for individuals (e.g., direct financial support through programs such as the Canada Emergency Response Benefit, as well as changes to Employment Insurance); businesses (e.g., wage and rent subsidies and interest-free loans), and nonprofit organizations (e.g., additional public investment in frontline organizations that address homelessness, food insecurity, disability issues, or mental health, among others). Beyond these state-led and state-funded supports, however, the COVID-19 pandemic also generated an ambitious response throughout Canadian society, from the mobilization of individuals through lockdown and social distancing measures, to nonprofits and charities adapting on the fly to meet increased demand. And while preliminary data suggests a steep decline in individual charitable giving (Imagine Canada, 2020a), there has been a prominent uptick in grassroots community-driven organizing in the form of mutual aid networks and the “caremongering” movement (Seow, McMillan, Civak, Bainbridge, van der Wal, Haanstra, Goldhar, & Winemaker, 2021).

Amid this unprecedented degree of public expenditure and community mobilization, many within the philanthropic sector quickly expressed a desire and commitment to contribute to the collective effort. On March 26, 2020, Community Foundations of Canada, Philanthropic Foundations Canada, Environment Funders Canada, and The Circle on Philanthropy and Aboriginal Peoples in Canada—four key member organizations within the sector—issued a joint statement outlining how grantmaking foundations should engage with their grantees during, and beyond, the COVID-19 crisis. Aptly titled “We’re All in This Together,” the document touched on several themes organized around principles of flexibility, collaboration, capacity-building, and supporting advocacy work. The four signatories further “invite[d] foundations across the country to adapt these [principles] to their context and join us in their implementation so that the organizations we fund can carry on their important work in our communities throughout and after the crisis” (Community Foundations of Canada et. al., 2020, para. 2). This joint call signalled a dramatic departure from the “snail-like” reflex (i.e., quickly returning to the safety and comfort of one’s shell) that characterized the response of philanthropic foundations during the 2008 financial crisis (Giving USA Foundation, 2009; Johnson, Rauhaus, & Webb-Farley, 2020; Reich & Wimer, 2012). It also invigorated a process of reflecting on—and reimagining how—organized philanthropy can and should deploy the roughly CDN\$85 billion in assets that Canadian foundations currently possess amidst the COVID-19 pandemic.

The article contributes to the emerging literature on the Canadian philanthropic sector’s response to the social and economic ramifications of COVID-19 (see Akingbola, 2020; Barr, 2020; Cho & Kurpierz, 2020; Lasby, 2020; McMullin & Raggo, 2020). It pays particular attention to major changes in policy and practice instituted by grantmaking foundations with equity and social justice mandates,¹ and the ways in which this crisis response may influence the evolution of philanthropic foundations post-COVID-19. Specifically, it seeks to address the following research questions:

1. In what ways have Canadian grantmaking foundations committed to equity and social justice responded to the COVID-19 crisis?
2. What has this response revealed about the dominant (pre-COVID-19) philanthropic model, particularly regarding its capacity to contribute to movements for equity and social justice?
3. What are the implications of these revelations for the philanthropic sector in terms of policy, practice, and research post-COVID-19?

The article draws on both case study methods and semi-structured interviews to look beyond the rhetoric and discourse coming out of the sector, toward concrete actions taken—as well as difficulties and challenges faced—by specific grant-making foundations and the grantees they support. It argues that, in the early months of the COVID-19 pandemic, grant-making foundations veered away from a dominant philanthropic model that is, among other things: relatively conservative; self-preserving through investment in growth-oriented endowments (Barkan, 2013; Jensen, 2019) and an unambitious disbursement quota (Boggild & Hawkesworth, 2017); managerial and project-oriented (Benjamin, 2010); and characterized by top-down power relations between funders and grantees (Chaidez-Gutierrez & Fischer, 2013; Fairfield & Wing, 2008). By demanding a departure from this “business as usual” approach to grantmaking, the COVID-19 crisis has made room for critical reflection on what can and should be transformed across the sector to create greater synergy between the philanthropic ecosystem’s various components, and to reimagine the sector as a more equitable, democratic, ambitious, and responsive social policy force in Canadian society.

The remainder of this article is divided in four sections. The first section provides an overview of the methodological approach to this study, as well as the dual qualitative data sets it draws on. The second section presents some of the key changes in grantmaking policy and practice in response to the pandemic, which are organized into four overarching themes: loosening rules, regulations, and restrictions for grantees; collaborating on new programs and initiatives; elevating grassroots knowledge and expertise; and balancing short and long-term priorities and goals. The third section critically examines these changes, discussing some of the major tensions they reveal about organized philanthropy in Canada, specifically in relation to the sector’s capacity to contribute to movements for equity and social justice. Finally, the article concludes by asking whether these changes can provide a model for how the sector can address the manifold social and economic crises in Canadian society that preceded—and will exist after—COVID-19.

METHODOLOGY

This article draws on interview data from two distinct qualitative research projects (which will hereafter be referred to as Project A and Project B) led by two different researchers conducted as part of the Canadian Philanthropy Partnership Research Network (PhiLab) around the philanthropic sector’s response to the COVID-19 crisis. Project A focused on the pandemic response of grantmaking foundations, with particular attention paid to the creation of new foundation-led initiatives and collaborations in pursuit of equity and social justice during the early stages of the pandemic. This case study research aimed to supplement existing macro-level analyses of the COVID-19 response of grantmaking foundations (e.g., Lasby, 2020; Philanthropic Foundations Canada, 2020), by documenting ongoing processes, policies, and practices in real time through an ad-hoc assemblage of semi-structured interviews with key voices within—or adjacent to—specific foundation-led initiatives or collaborations. This data was then used to inform four descriptive case studies recently published by PhiLab (Sidorovska & Duprez, 2020). This article, however, primarily relies on semi-structured interviews with eight individuals from Project A. Each of these individuals is closely involved with one or more foundation-led initiatives that have explicitly challenged mainstream approaches to philanthropic grantmaking. The participants interviewed hold diverse roles and positions within the sector, including foundation chief executive officer ($n = 3$), consultant ($n = 1$), foundation staff ($n = 2$), and Indigenous knowledge keeper ($n = 2$). Each of the eight interviews lasted between 60 and 90 minutes.

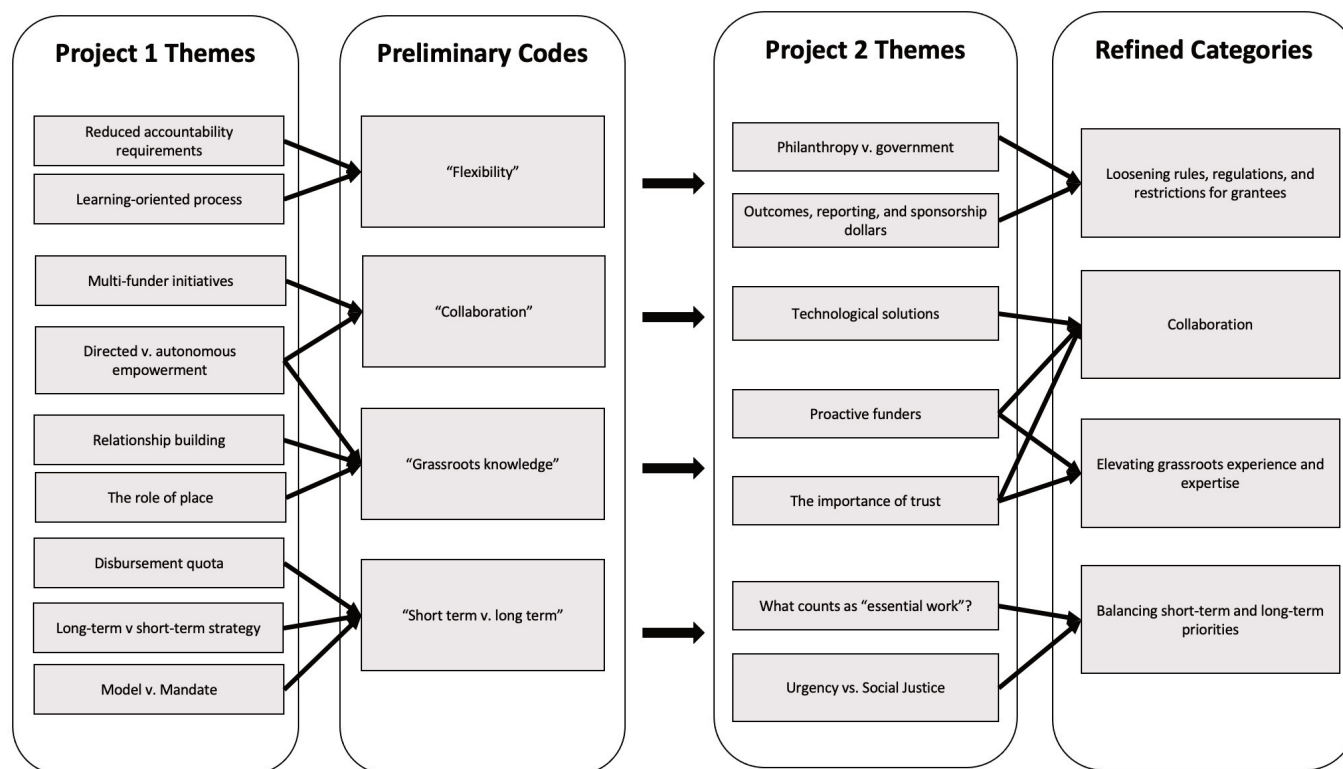
This foundation-focused data was complemented with data from Project B that examined how social justice grantee organizations in Montréal and Toronto experienced the philanthropic sector’s COVID-19 pandemic response. These COVID-19-specific interviews were one component of a larger critical investigation of the experience of social justice grantees within Canadian philanthropy more broadly. This article focuses on 22 interviews drawn from this second research sample. All grantee organizations participating in Project B engage in programming that targets systems and structures of power in addition to more traditional charitable services. These organizations vary in annual expenditure (from ~\$50,000 to ~\$25 million) and percentage of total annual revenue from philanthropic sources (from 0% to over 90%). The program focus was deliber-

ately varied as well, including “marginalized youth” ($n = 4$), “racial justice” ($n = 4$), “refugees and newcomers” ($n = 3$), “inclusion” ($n = 3$), “LGBTQ issues” ($n = 2$), “Indigenous issues” ($n = 2$), “Islamophobia” ($n = 1$), “women’s issues” ($n = 1$), “public education” ($n = 1$), and “criminal justice reform” ($n = 1$). The total length of each interview ranged from 40 minutes to 90 minutes. Together, this article draws on in-depth semi-structured interviews with 30 individuals, all of which were conducted over Zoom, Skype, or by telephone between May and August 2020.

Data analysis

Data analysis for this article followed a two-step process (see Figure 1). First, the research lead of Project A developed descriptive case studies (Gomm, Hammersley, & Foster, 2000) for each of the four initiatives, organized around five topics: a description of the initiative; the rationale behind the initiative; the rationale behind joining the initiative; expected outcomes; and similarities and differences from pre-COVID-19 work. After writing a draft of the descriptive portion of each case study, the research team for Project A met to identify key analytical tensions present within each case study.

Figure 1: Coding process



After identifying nine case study themes, the lead researcher of Project A conducted a narrative literature review (Paré, Trudel, Jaana, & Kitsiou, 2015) using these themes as search criteria in order to situate the case studies in relation to ongoing conversations in the larger foundation literature. Through this process, the researcher consolidated these heterogeneous themes into four higher level descriptive codes (Miles & Huberman, 1994) that both reflected their data, as well as broad conversations in the extant literature: flexibility, collaboration, grassroots voices, and short-term versus long-term. Once the research leads of Project A and Project B decided to collaborate on this topic, the researcher from Project A shared the four descriptive codes with the lead of Project B who then used them for the deductive coding (Saldaña, 2011) of that project’s interview data. The researchers then met to discuss important areas of overlap between the two sets of data, sharing key themes and second-order codes that emerged from their respective coding processes.

Some themes were present within both data sets (e.g., flexibility with grantees), while others were closely related (e.g., short-term versus long-term priorities for funders and urgency versus social justice mandates for grantees). After finding areas of overlap and excluding areas without any overlap, the two teams settled on four core categories of grantmaking responses during the COVID-19 pandemic: loosening rules, regulations, and restrictions for grantees; collaboration; elevating grassroots experience and expertise; and balancing short-term and long-term priorities.

CHANGES IN PHILANTHROPIC POLICY AND PRACTICE DURING COVID-19

Loosening rules, regulations, and restrictions for grantees

Since March 2020, many grantmaking foundations have loosened the rules, regulations, and restrictions placed on grantees, primarily as they relate to spending, reporting, and application procedures (McCormick, 2000; Philanthropic Foundations Canada, 2020). This has allowed grantees to repurpose project funds to meet their shifting priorities and needs, as well as those of the communities they serve. Across our interviews, grantees reported diverting funds to urgent goods such as personal protective equipment and foodstuffs; emerging needs such as access to digital technologies and one-to-one counselling support; and/or “capacity” dollars to maintain grantee operations, pay staff salaries, and keep their organizations afloat.

In some cases, grantmaking foundations proactively contacted grantees to inform them of this newfound flexibility. The Lawson Foundation (2020), for example, sent a letter to grantees and partners, announcing that: “the Foundation will provide you with increased flexibility in the way you spend the dollars ... so that you may more easily cover urgent costs that are essential to the running of your organization” (para. 3), and further categorized funds as “unrestricted during these challenging times” (para. 3).

In addition to formal announcements, many grantees received informal phone calls and emails from their funders. One interviewee, the executive director of a Montréal-based charity that works with refugees and asylum seekers, recalls being contacted by one such private foundation. “‘We want to talk to you,’ they said. ‘Do you need money? Like, right away?’” Another foundation—this one corporate—reached out to him directly and said, “We’re planning to send you money in November. But do you need it now?”

Other grantees contacted funders themselves, described the challenges they were facing, and asked for flexibility on existing grants. While these requests were grantee-driven, they often were quite successful. The executive director of a charity that works with youth in under-resourced communities in Toronto explained:

I’ve reached out to some of our long-term donors and asked if I could convert their project money into sustaining dollars for the organization. And we’ve actually had a lot of success in doing that. And now we are able to continue to work.

The loosening of restrictions on grantees extended to the area of reporting requirements as well. A November 2020 survey conducted by Philanthropic Foundations Canada (2020) found that 62 percent of respondents modified reporting procedures and deadlines in response to COVID-19. While many of these modifications were initiated by foundations at the start of the pandemic, as of January 2021, they remain prominently displayed on foundation websites and promotional materials.

Grantees found relief in this newfound flexibility around deadlines. “Funders have been really good with extending deadlines and giving you more time to submit grants and things like that,” said the artistic director of a Toronto-based arts for social justice charity. They describe their funders as “flexible” and aware that “not everything is going to happen the way that we thought it was going to happen. ... There’s been a lot of funders going, ‘We’re not going to penalize you if you’re not able to finish this in time.’”

Lastly, there has been a significant shift in grantee application requirements, particularly as it pertains to foundations offering COVID-19 emergency grants. As with the lifting of restrictions on spending and reporting for existing grantees, this strategy has been part of an emergency effort in the sector to reduce administrative and management burdens on grantees and ensure that organizational resources can be directed toward program operations rather than administrative tasks (Finchum-Mason, Husted, & Suárez, 2020). These shifts play out clearly in the application procedures instituted for emergency philanthropic grants. The Lucie et André Chagnon Foundation (2020), for example, created a new category of grants for “organizations interested in submitting a one-time request” (para. 3). These requests are submitted through a written email describing the initiative, how it aims to meet needs directly caused by the pandemic, and an explanation of how it aligns with the specific priorities of the foundation. These changes, where present, indicate a significant departure from time-intensive application processes that can penalize smaller, less professionalized charities without dedicated fundraising staff (Yi, 2010). Taking a step back from such requirements may provide new perspectives on the purpose of grant applications and, if less complex, may be more conducive to realizing a foundation’s philanthropic mission.

Collaborating on new programs and initiatives

Collaboration has played an important role in the foundation response to the COVID-19 pandemic (Philanthropic Foundations Canada, 2020). Foundations have joined forces with community partners, funding partners, and government agencies, to share knowledge and expertise between communities and funders—as well as between funders—to ensure that funders complement each other rather than double efforts; pool funds to craft and scale solutions to address complex systemic challenges; and decrease overhead/administrative costs. As one foundation leader explained,

It was essential that we found ways to share information, and build real transparency and clear collaborations to best meet needs. The openness across foundations to engage in this way was an important evolution in how we work and one I hope we can build upon.

An example of this collaborative process is the Indigenous Peoples Resilience Fund (Community Foundations of Canada, 2021). Indigenous knowledge holders set up the initiative in partnership with several non-governmental funders as a tool to support Indigenous communities during the public health crisis. From the start, this collaborative process was defined by two distinct, yet complementary, conversations: a partner’s table that served as an opportunity for funders to learn about Indigenous approaches to philanthropy, and a dialogue among recognized Indigenous knowledge holders and community actors regarding how to immediately and strategically operationalize this philanthropic support. According to one foundation CEO affiliated with the project, the partners table,

allowed funders to learn about the ways in which the Advisory Council of the Indigenous Peoples Resilience Fund was approaching the work and doing things differently than Western-style philanthropy. It also provides an entrée for others who are interested in learning, being engaged, and walking alongside the fund.

These dual conversations shaped the current set-up of the Indigenous Peoples Resilience Fund as a collaborative, multi-funder, country-wide, and Indigenous-led endeavour.

The pandemic also led to new joint initiatives around large-scale issues within the sector that funders would be unable to tackle on their own. A notable example of this is the GIVE5 pledge: an initiative put forth by several private and community foundations to increase the total amount of funding disbursed by grantmakers across the sector. Currently, the Canada Revenue Agency requires that foundations allocate at least 3.5 percent of their total assets to charitable donees annually. However, organizers of the GIVE5 pledge contended that, given the profound impact of COVID-19 on the charitable sector, foundations should pledge to disburse at least five percent of their total assets during 2020. According to calculations conducted by the GIVE5 steering committee, a sector-wide increase in asset disbursement from 3.5 to five percent would translate into an additional CND\$700 million streamed to the charitable sector in 2020.

Despite securing an additional flow of CND\$21.5 million into the charitable community (Sidorovska & Duprez, 2020), the GIVE5 campaign failed to achieve its target of 100 signatories. One of the initiators and a member of the GIVE5 steering committee notes that he was partially surprised by the slow reaction in the philanthropic community:

I thought the way it would go is that it would be hard to get the first 10 or 15, and then it would be easy to get the rest. They would think someone has done the due diligence, so there would need to be good names in the first [place] ... but this is not the way it works in the foundation community.

Nevertheless, the campaign invigorated critical debate regarding the role of foundations in addressing social and economic inequalities, as well as how philanthropic assets—including foundation endowments—can best be used to advance philanthropy's mission. While the argument that philanthropic foundations should be required by law to redirect all of their assets toward impact investments (i.e., the other 96.5%) has been floated by critical voices in the sector (e.g., Young, 2019), this call was formalized to some degree with the launch of the #Other95 campaign on May 11, 2020, by The Circle on Philanthropy and Aboriginal Peoples in Canada (Archie, 2020).

Elevating grassroots expertise and approaches

At the start of the pandemic, a series of mutual aid projects—emergency support funds and “caremongering” networks, for example—emerged across Canada to channel support directly to individuals and communities most impacted by COVID-19, including those with the highest risk of illness and those facing the greatest barriers to accessing resources and supplies (Paarlberg, LePere-Schloop, Walk, Ai, & Ming, 2020). The frontline organizations coordinating these mutual aid projects were often best situated to assess urgent needs and channel resources toward relief as situations on the ground continued to unfold; they were also uniquely positioned to translate immediate relief efforts into long-term community capacity-building. And yet, while these frontline groups were providing some of the most direct and urgent support to communities in need, they were (typically) forced to do so without the help of Canada's philanthropic sector. Because these organizations do not have official charitable status, they are legally known as “non-qualified donees” and are barred from receiving grants from foundations within the Canadian Revenue Agency's current regulatory framework.

In response, the early days of the COVID-19 crisis saw a proliferation of discourse in the philanthropic sector around the importance of local grassroots expertise and why “bottom-up” knowledge is essential to emergency grantmaking. Through Zoom webinars, articles, blog posts, and workshops, emphasis was placed on the perspectives of equity-seeking communities—specifically Black- and Indigenous-led organizations and movements (e.g., MacDonald, 2020; Tremblay, 2020)—as well as why grantmaking foundations should support non-qualified donees (e.g., Hibbon, 2020). As researchers and foundations collaborated on toolkits explaining the mechanisms grantmaking foundations can use to direct resources to non-qualified donees (e.g., Kassam, 2020), organizations such as Imagine Canada and political figures such as Senator Ratna Omidvar openly called for the removal of regulatory barriers to philanthropic funding of “non-qualified donees” (e.g., Omidvar, 2017). While the energy around this topic was palpable, it is currently difficult to determine the figures on foundation support of non-qualified donees. A recent survey by Philanthropic Foundations Canada (2020) found that only 19 percent of its members had provided funds to non-qualified donees during the pandemic.

Beyond the question of non-qualified donees, a number of prominent grantmaking foundations set up ad-hoc teams with local leaders and community-based collaborators with the purpose of allocating funds to local communities. The objective of the approach was to have community partners decide where emergency support should go in a timely manner. Apart from ensuring the prompt availability of funding to local communities, this approach allowed foundations to tap into local expertise and ensure funding was tailored to emergency community needs. Other funders used a similar approach by establishing advisory boards made up of grantees and project beneficiaries. One of Canada's largest private foundations relied on an Indigenous Leadership and Insights Circle to guide its COVID-19 recovery and resilience program. The head of programs at the foundation explained the process they followed:

We convened the Indigenous Leadership Insight Circle. This was a group of about 20 people and a representative group drawn from community and civil society organizations including young people, educators, and community leaders from across the country. We reached out through networks, came up with a quick terms of reference and said: “Would you be prepared to just help us think through some of these challenges, bring forward ideas, help us source ideas, and make sure that we’re paying attention to the right information?” And we were pleasantly surprised that every single one said yes.

In doing so, they were drawing on grassroots knowledge and expertise, rather than dominant top-down approaches, as part of their philanthropic response to the pandemic.

Balancing short- and long-term priorities and goals

The tension between “provid[ing] emergency funding AND tak[ing] the long view” (Community Foundations of Canada et al., 2020, para. 7) is at the centre of the philanthropic sector’s pandemic response. Philanthropy’s short-term emergency response arose from the understanding that COVID-19 disproportionately impacts the health and livelihoods of marginalized communities (Canadian Human Rights Commission, 2020; Jenkins, Gadermann, & McAuliffe, 2020), thereby increasing demand for charitable programs and services (Lasby, 2020). This increased demand for services, however, was coupled with the loss of charitable sector revenue, which placed nonprofits and charities in an increased state of precarity (Johnson et al., 2021; Lasby, 2020). Across the sector, the emergency response of funders was achieved through both the creation of new COVID-19-specific funding opportunities and grant streams (e.g., Lawson COVID-19 Fund [2020]; McConnell COVID-19 Emergency Response Fund [2020]), as well as the aforementioned removal of restrictions on existing grants.

The rationale behind a long-term social change approach is that the societal inequities that COVID-19 revealed and exacerbated existed long before the pandemic began (Van Dorn, Cooney, & Sabin, 2020). Likewise, these inequities will continue long after philanthropy’s emergency response runs its course. Differently put, philanthropy should respond to the crisis of inequities that COVID-19 has revealed and intensified, rather than responding to the COVID-19 crisis, itself. By addressing these longer-term structural issues, philanthropy would help ensure that future crises will not be felt disproportionately in marginalized communities. Throughout the sector, this long-term approach has taken the form of explicit commitments to substantially increase future grantmaking through either lump sums or an increased disbursement quota, and/or the creation of new granting or investment streams geared toward rebuilding the nonprofit and charitable sector and the communities it serves.

In practice, prominent Canadian foundations have instituted varying approaches to attempt to manage the tension between short- and long-term priorities. The Lawson Foundation, for example, created a series of emergency “pop-up community grants,” removed all restrictions and reporting requirements on existing grants, and launched several local ad hoc teams to allocate funds in support of organizations in need. The foundation also instituted a phased approach to releasing funds to balance short- and long-term priorities. While emergency funding was disbursed within the first few weeks of the pandemic, these new initiatives continued until the end of the year. This gradual roll-out of funds attempts to balance short-term urgency with a longer-term outlook on the future needs in the sector.

The Lucie and André Chagnon Foundation (2020a), on the other hand, struck this balance by creating a short-term emergency grant stream for “initiative[s] aimed at meeting needs directly caused by the pandemic” (para. 4), with a bold commitment of disbursing an additional \$150 million in grants over the next five years “to allow the implementation of long-term structural projects in various regions across Québec” (Chagnon 2020b, para. 5). The McConnell Foundation has attempted to navigate this tension by pairing its COVID-19 emergency fund with a new stream within its Social Innovation Fund—called Organizational Rebuilding—dedicated to rebuilding the sector post-COVID-19.

While foundations responded to the call to balance short-term and long-term approaches through the institution of new policies and programs, grantee experiences of this tension were more complicated. For grantee organizations that typically emphasize long-term social change work, COVID-19 made it imperative that they focus their energy on short-term essential services. The pandemic disproportionately impacted the marginalized communities that social justice grantees serve and advocate for. As a result, these organizations had to put a pause on their social change and advocacy work and prioritize providing essential services and emergency goods. For many charities, this shift in organizational priorities occurred at the very beginning of the pandemic. As the director of philanthropy at one of Toronto's largest LGBTQ advocacy organizations explained:

the [organization] that existed on March 14 [pre-lockdown] doesn't exist anymore. We have completely reorganized our organization. With very few exceptions like myself, the role you had doesn't exist anymore. You are now an essential services worker and we're doing essential services seven days a week. That's all we do. Everyone has been completely retrained. And it's seven days a week—meals, clothing, harm reduction, counselling.

Other grantees report shifting away from core programming toward “community supports,” such as one-on-one phone check-ins with community members, or expanding existing services to meet the increased economic, social, and psychological challenges faced by the communities they serve.

The COVID-19 pandemic prompted a shift in grantmaking priorities and approaches. While many of these changes were imagined as momentary responses to the crisis, they nevertheless serve as an opportunity for examining underlying tensions within the dominant philanthropic model. In the process, it is possible to begin to envision and articulate what a more responsive, equitable, and democratic grantmaking practice can look like post-COVID-19.

DISCUSSION

This section explores some key issues, concerns, questions, and tensions that have emerged from these changes in philanthropic grantmaking. It is organized by scale and theme: organizational-level tensions, accountability; field-level tensions, model; and macro-level tensions, philosophy.

Organizational-level tensions: Accountability

This research reveals a notable shift in philanthropic policy and practice in response to COVID-19. These findings are corroborated by international studies on early foundation responses to COVID-19, noting comparable changes in granting accountability practices and the grantor-grantee relationship (see Finchum-Mason et al., 2020; Sato, Kumar, Coffman, Saronson, Webster, Gulliver-Garcia, Moore, & Entcheva, 2020). Most notably, throughout the pandemic, there has been a widespread shift from project-based to core funding, the institution of leaner administrative procedures, and a movement from funder-directed development toward a grantmaking relationship that is, in theory, bottom-up and community-directed. These changes—which prioritize responsiveness to community needs—mark a departure from a top-down philanthropic model where funders direct, streamline, and manage the efforts of community organizations (Christensen & Ebrahim, 2006; Ostrander, 2007; Shaw & Allen, 2009). In doing so, these changes have also emphasized the tension between accountability through rationalization and organizational control, and the implications of this approach on the ability of community organizations to respond to community needs in an effective and sustainable way.

The focus on nonprofit activities being more methodically planned and rationalized is part of a wider societal trend to ensure greater sector effectiveness (Bromley, Hwang, & Powell, 2012; Helmig, Jegers, & Lasley, 2004). Rooted in the notion that good intentions are not sufficient to ensure social change, the past 30 years have brought a growing emphasis on upward accountability in the sector, manifested through increased scrutiny in reporting, monitoring, and directing grantee

efforts (Christensen & Ebrahim, 2006; Ostrander, 2007). These models have also highlighted power differences between funders and grantees, moving from a mutual, interactive relationship to what Susan Ostrander (2007) refers to as funder-directed philanthropy. However, these increased upward accountability requirements are often found to be too demanding for many nonprofits and eventually threaten downward and lateral accountability, a beneficiary-centric focus, and even mission attainment (Barkan, 2013; Shaw & Allen, 2009).

Critics of the approach further argue that such levels of external control and direction interfere with organizational capacity for providing prompt and innovative support to the communities they serve, due to demanding administrative procedures that redirect organizational energy away from community needs and development agendas (Benjamin, 2010; Meyer & Simsa, 2014; Shaw & Allen, 2009). This is especially true for smaller, less professionalized organizations that lack the human, financial, and administrative resources to respond to this multiplicity of funder-led demands. Coupled with the overall resource dependency of community organizations, these practices also lead to a large imbalance of power between funders and grantees, as grantees become more and more accountable to their funders rather than the communities and individuals they serve (Benjamin, 2010). The literature also suggests that the reduction of upward accountability, as witnessed through the COVID-19 pandemic response, leaves more room for lateral and downward accountability, allowing organizations to focus more on beneficiaries and enabling the achievement of intended outcomes (Benjamin, 2010; Christensen & Ebrahim, 2009).

In their attempt to address the COVID-19 crisis, grantmaking foundations have encountered this tension between control and accountability procedures on the one hand and effective support for local communities on the other (McCormick, 2020; Philanthropic Foundations Canada, 2020). By introducing more flexibility in management procedures and placing greater power in the hands of grantees to lead the pandemic response, funders have taken a step back from their demands. This ensures that community organizations are better positioned to plan and coordinate their program activities, tend to their operating capacity, and develop interventions that are tailored to specific community needs. In the COVID-19 context, this modified relationship allowed for grassroots organizational resilience and innovation as the sector struggled to respond to increased demands while facing shrinking resources. Despite being an emergency adjustment, the shift also showed the potential to reduce power imbalances and pave the way for a more equitable relationship between funders and grantees (Benjamin, 2010; Christensen & Ebrahim, 2006).

The long-term implications of these temporary approaches to accountability, program effectiveness, and community empowerment warrant further study, as there are strong indications that a more flexible, partnership-oriented model of collaboration between funders and grantees may end up being more conducive to philanthropic work in pursuit of equity and social justice (Ostrander, 2007). At the same time, this form of support for organizations may also contribute to the sustainability of community support systems and grassroots initiatives that have proven themselves essential during this crisis, making room for effective, locally guided, self-empowering action.

Field-level tensions: Model

Several initiatives launched in response to the COVID-19 crisis have reinvigorated public discourse around the annual spending and disbursement quota of foundations, the way the full portfolio of philanthropic assets is being used in relationship to the broader foundation mandate, and the rules and regulations stipulating who can legally receive philanthropic grants or donations. These debates reveal a potential contradiction between philanthropy's societal mandate and the legal frameworks that regulate and govern philanthropic giving (Finchum-Mason et al., 2020; Leat, 2016). During COVID-19, discourse surrounding the annual spending requirements of foundations centred on how to balance the long-term protection and growth of philanthropic sector assets with rapid large-scale grantmaking and the opportunity to address immediate social concerns and issues.

Since March 2020, there has been an uptick of interest around the disbursement quota—the amount that a philanthropic foundation is legally required to disburse each year in charitable giving. Currently, the disbursement quota is set at 3.5 percent. This number has steadily decreased from five percent in 1975 to 4.5 percent in 1984 to the current amount, which was set in 2004 (Man, 2011). However, as many have argued, the current 3.5 percent quota is marginal when compared with the ten percent rate at which philanthropic assets are growing annually tax-free (Hallward, 2020; Palassio, 2020), and an increase would by no means result in foundations spending away their endowments.

The discussion of the appropriateness of the legally mandated payout minimum is beyond the scope of this article; it touches on questions related to the perpetual existence of foundations and intergenerational social justice (see Leat, 2016; Topeler, 2004). Yet, campaigns such as GIVE5 or Increase the Grants raised important questions around the willingness of foundations to increase their contributions to social causes by increasing the actual payouts, especially in a situation of crisis. Initiatives such as the #other95 campaign, have asked how the full array of foundation resources can be used to contribute to social causes, based on where foundations invest the remaining 95 percent of their assets. Current policies place no constraints on how foundations manage their endowments. As a result, there is no way to ensure that they aid rather than aggravate issues of inequality and social and environmental injustice. As existing legal frameworks pose minimum requirements on how much—and to where—foundations invest and fund (Barkan, 2010), these conversations have pointed out a possible misalignment between foundation missions and mandates on the one hand and how their assets are used and invested on the other.

Another policy question that received substantial attention throughout 2020–2021, and points to the tension between philanthropic mandate and current regulations, is the legal definition of “non-qualified donees.” Throughout the pandemic, grantmaking foundations committed to equity and social justice have prioritized grassroots expertise and knowledge, whether through shared learning sessions, bottom-up research initiatives, community-based advisory teams, or new forms of collaboration. And yet, current regulatory frameworks prohibit the philanthropic support of many frontline organizations best situated to assess urgent needs and channel resources toward relief as situations on the ground continue to unfold. Many of these groups—Black Lives Matter chapters, Solidarity Across Borders, and the Disability Justice Network of Ontario, for example—have also been uniquely positioned to translate immediate relief efforts into long-term community capacity building. As non-qualified donees, they are typically forced to do so from outside Canada’s philanthropic ecosystem. These groups are barred from receiving grants from foundations and registered charities within the current regulatory framework of the Canada Revenue Agency. Likewise, foundations and registered charities risk losing their own legal status if they provide grants to non-qualified donees. During the COVID-19 pandemic, some organizations and actors in the philanthropic community have called for a temporary lifting of restrictions on granting to non-qualified donees. Others have begun innovating new strategies and practices for getting around the restrictions on grantmaking to frontline non-qualified donees. Yet, anything but a systemic approach to the issue would mean underestimating the influence and relevance of these organizations, especially considering the growing recognition of their value as both agents of social change and emergency response.

These examples indicate an underlying contradiction between the philanthropic mandate and the existing policies that regulate foundation giving. As future crises are navigated, these field-level tensions deserve further scrutiny to ensure the existing legal framework is better aligned to the mandate and mission of philanthropy to enable greater effectiveness in implementing social change.

Macro-level tensions: Philosophy

The COVID-19 response of grantmaking foundations has revealed a series of tensions underlying philanthropy’s presumed role, function, and mandate within the larger Canadian social policy arena. To be clear, critical philanthropy scholars have

explored some of these tensions and contradictions in the past, from the privileged tax treatment of foundations (Raddon, 2008) to the exploitative processes of capital accumulation that produce foundation assets (Saifer, 2020). What is unique about the COVID-19 philanthropic context, however, is the degree to which foundation-led changes in grantmaking practice, themselves, attempt to navigate these core macro-level tensions.

Perhaps most evident in these foundation-led responses is the tension between a “charity approach” and a “social justice” approach to philanthropic work (Burton & Barnes, 2017; Jensen, 2019) and how this tension uniquely manifests within the COVID-19 context. Here, a charity approach refers to the funding of direct social services to respond to direct social needs, while a social justice approach targets “structural realities [and] the root causes of current economic or political inequality and injustice” (Ramdas, 2011, p. 395). In this way, a social justice approach takes a long-term view to grantmaking, working to abolish the very need for philanthropy by altering “societal institutions so they don’t produce the very problems that ‘charity’ tries to alleviate” (Rabinowitz, 1990, p. xi).

This distinction between a charity approach and a social justice approach as it relates to philanthropy’s societal function has been emphasized during the COVID-19 crisis. The sector has delivered a dramatic increase in emergency funding that targets urgent needs such as medical supplies, rising food insecurity, mental health challenges, and increased costs associated with physically distanced service provision (Phillips, Raggo, Pue, & Mathieson, 2020). From rapid response grantmaking to the Emergency Community Support Fund, funders have mobilized over CND\$172 million through new grants, as well as through the reallocation of existing grants (Philanthropic Foundations Canada, 2020). On the other hand, grantmaking foundations have also demonstrated a keen awareness of how the COVID-19 pandemic is exacerbating already-existing social injustices in Canadian society—particularly around anti-Black racism and economic injustice. This is evidenced by the proliferation of discourse in the sector around “an equitable recovery” (e.g., Nakua, 2021, para. 4) and “philanthropy for racial justice” (e.g., Toronto Foundation, 2020, para. 1), as well as long-term initiatives that aim to identify and combat the societal structures underlying COVID-19’s unequal impact. In other words, within grantmaking organizations, there is a push toward addressing not just the COVID-19 crisis but the long-term crises in Canadian society that COVID-19 has revealed and, in some cases, intensified.

This, however, is complicated by the fact that changes in “traditional” charitable grantmaking practice—particularly, around increased flexibility with grantees in response to COVID-19—have been fundamental to the long-term sustainability of social justice grantees during the crisis. This research highlights how social justice grantee organizations have been forced to step away from their social justice and advocacy work, shifting their focus to providing direct services within the communities they work with. As these grassroots organizations, for their part, temporarily transitioned from a social justice approach to a charity approach, they benefitted from the extensive flexibility displayed by many grantmaking foundations that was often absent in their relationships with government funders. In this way, it was through philanthropy’s charitable focus—albeit, with a greatly increased degree of flexibility—that grantmaking foundations were able to prop up the work of equity and social justice-focused grantee organizations, both in this moment of emergency and in the long-term.

A related question concerns philanthropy’s function vis-a-vis government. While grantmaking foundations have demonstrated a degree of flexibility and trust absent within grantee-government relations, it is still important to note that the bulk of COVID-19 supports—from the Canadian Emergency Response Benefit to the Rapid Housing Initiative—have been led by the government. This is due to the sheer size and scale of government in comparison with the philanthropic sector. Because philanthropy is not capable of funding any universal programs, yet grantmaking foundations receive extremely generous tax treatment that redirects funds away from government programmes, it is necessary to ask what the responsibility of philanthropy is and how philanthropic organizations can be best positioned to help create a more socially and economically just society.

CONCLUSION

This article began by asking how Canadian grantmaking foundations with equity and social justice mandates have responded to the COVID-19 pandemic and what these crisis-driven changes reveal about philanthropy's relation to movements for equity and social justice. It is important to note that because the pandemic is still active, the research team has yet to successfully reach a saturation point. Nevertheless, through the research process, a few recurrent themes took shape via concrete changes in grantmaking policies, programs, and practices, including increased flexibility with grantees, new collaborations, the prioritization of grassroots expertise, and balancing long- and short-term planning. Notably, these changes did not occur within a silo; rather, they closely mapped onto the priority points detailed in the joint statement released in March 2020 by Community Foundations of Canada, Philanthropic Foundations Canada, Environment Funders Canada, and The Circle on Philanthropy and Aboriginal Peoples in Canada (2020). In this way, the observed changes in grantmaking practice suggest the emergence of a collective will within the philanthropic sector—a desire to rethink and reimagine philanthropic grantmaking practice in the face of the COVID-19 crisis.

These changes in grantmaking foundation practice also exposed and emphasized a series of limits and tensions within mainstream approaches to philanthropic grantmaking. At the organizational level, the sector's COVID-19 response highlighted the perpetual tension in the traditional funder-grantee model between top-down control and accountability and a more flexible model that elevates grassroots expertise. In responding to the urgency of the crisis, grantmaking foundations have transitioned from project-based funding to core funding, instituted simplified and sparse administrative procedures, and adopted grantmaking relationships that are increasingly bottom-up and community-directed. The objective of these changes was to relieve the administrative burden on charitable organizations while recognizing the legitimacy of the knowledge, expertise, and approaches of grantee organizations. At the field level, the sector's COVID-19 response emphasized the contradiction between the social, economic, and ecological mission of philanthropic foundations and grantmaking foundations' ability to exist as a charitable entity in perpetuity. New initiatives such as the GIVE5 pledge and the #other95 campaign signal that some within the sector are seriously grappling with these issues. And yet, it is important to highlight that these two initiatives are both voluntary and short term. Addressing this tension between the mission of philanthropy and the organizational perpetuity of philanthropy would require long-term mandatory regulations that could only be accomplished through changes at the level of policy and charitable tax law. Finally, at the macro level, the sector's COVID-19 response underscored the complicated relationship between a charity approach to philanthropy and a social justice and advocacy approach, asking: what is the purpose of philanthropy and the philanthropic sector within the larger Canadian social policy context within times of crisis?

The pandemic's disproportionate impact on poor, racialized, and Indigenous communities; the elderly; and those living with disabilities can be traced back to pre-COVID-19-era failures in social and public policy infrastructure. These include policies that have contributed to growing wealth inequality, the reduction of government provisions to low-income families, cutbacks to healthcare services, and privatization of long-term care facilities, among many others. In the philanthropic sector's response to the COVID-19 crisis, we can see a shared realization—at least for the time being—that these inequalities were, at best, inadequately addressed by philanthropic grantmaking and, at worst, exacerbated by it. As philanthropic sector rhetoric emerging from the pandemic calls for policies, programs, and practices that contribute to long-term institutional and structural reforms beyond the pandemic, the sector is forced to address these macro-level philosophical tensions around how it can best contribute to these sorts of transformations.

It is on this last point that we wish to end this article. The philanthropic sector has displayed renewed energy, imagination, and will, which has translated into an unprecedented crisis-response. In doing so, the sector has altered the traditional approach to doing philanthropic grantmaking to meet the urgent needs of grantees. If this approach is appropriate for the COVID-19 crisis, why is it not appropriate for the social, economic, and environmental crises that preceded, contributed

to, and will outlive the social and economic impact of the pandemic? Can the current emphasis on flexible, leaner, bottom-up, and community-driven grantmaking practice serve as a model for sector-wide action on climate change? Systemic racism? Rapidly increasing wealth inequality and homelessness? Health and educational disparities? How can grantmaking foundations—and the philanthropic sector at large—mobilize and direct the strategies, tools, policies, programs, and learnings from the COVID-19 crisis toward these ongoing crises? These questions are of vital importance to both researchers and practitioners in the sector.

NOTE

1. The phrase “equity and social justice mandates” is used with acknowledgement that there exists significant debate regarding what this commitment looks like and valid critiques that the very existence of the philanthropic foundation is in direct conflict with ideals of equity and social justice. This article does not focus on evaluating what kinds of philanthropic programs support equity and social justice; rather, it takes as its empirical focus, grantmaking foundations with mandates and missions organized around language of equity, social change, structures of power, and issues of social justice.

WEBSITES

Black Lives Matter, <https://blacklivesmatter.com/>
Canadian Philanthropy Partnership Research Network, <https://philab.uqam.ca/en>
Disability Justice Network of Ontario, <https://www.djno.ca/>
GIVE5, <http://give5.ca/>
Increase the Grants, <https://increasethegrants.ca>
Lawson Foundation, <https://lawson.ca/>
McConnell Foundation, <https://mcconnellfoundation.ca/>
Solidarity Across Borders, <https://www.solidarityacrossborders.org/en/>

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COVID-19 and the Restructuring of Collective Solidarity: The Case of Volunteer Activity in Québec

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ABSTRACT

Drawing on a combination of survey data, semi-structured interviews, and document analysis, this article explores the main forms of restructuring that have taken place within Québec's voluntary sector in response to the COVID-19 pandemic. It centres on three main shifts: the designation of certain voluntary activities as "essential services" by politicians; the implementation of new approaches to soliciting, matching, and retaining volunteers; and the institutionalization of a new health-centric rationality within the supervision of volunteer work. The article concludes by calling for recognition, in theory and practice, of the essential role that volunteering plays with regard to socio-territorial resilience.

RÉSUMÉ

Mobilisant les données d'un travail de veille portant sur l'impact de la pandémie de COVID-19 sur le secteur de bienfaisance au Québec, cet article explore les principales restructurations qui se sont opérées au sein du secteur bénévole. Nos enquêtes nous ont permis d'en dégager trois : la qualification, par le politique, de certaines activités bénévoles en « services essentiels » ; la mise en œuvre de nouvelles approches en matière de sollicitation, de jumelage et de rétention des bénévoles ; l'obligation pour les organismes d'encadrer le travail des bénévoles en fonction d'une « rationalité sanitaire ». L'article se clôt avec une discussion où nous appelons à reconnaître, tant en théorie qu'en pratique, le rôle incontournable du bénévolat en matière de résilience socio-territoriale.

Keywords / Mots clés : Volunteering; Covid-19; Québec; Registered charities; Essential services / Bénévolat; Covid-19; Québec; organisme de bienfaisance; services essentiels

INTRODUCTION

The COVID-19 pandemic has had a dramatic impact on work, labour markets, and organizational life across Canada. Researchers in Québec have examined the effects of COVID-19 on healthcare workers (Dubé, Hamel, Rochette, Dionne,



Tessier, Pelletier, & Institut national de santé publique du Québec, 2020); changes in working conditions, notably in relation to telecommuting (Saba & Cachat-Rosset, 2020; Tremblay, 2020); and on the evolution of the labour market in a broader sense (Castro, Lange, & Poschke, 2020). While these insights and analyses are certainly significant, the vast majority of them deal with one particular form of work: remunerated or paid work. These studies leave aside unpaid or volunteer work, which are essential to the functioning of Canadian society, particularly in times of social and economic crisis. This article addresses this research gap by exploring the impact of COVID-19 on the economic, social, and political function of volunteer activity in Québec. Moreover, it explores how the COVID-19 crisis has reworked the meanings and practices of solidarity, mutual aid, and generosity within the Québec voluntary sector and the subsequent impacts on volunteer resource management.

In 2018, 12.7 million people living in Canada (41% of those 15 or older) volunteered for charitable organizations, nonprofit organizations, or community organizations (formal volunteering). They contributed 1.7 billion hours, the equivalent of 863,000 full-time-equivalent jobs (Hahmann, du Plessis, & Fournier-Savard, 2020).¹ Apart from Canadians who volunteer formally, more than twice as many individuals aged 15 and over offer direct informal aid to persons living outside their household, such as relatives, friends, and neighbours. This world of volunteerism has been profoundly impacted by the exceptional circumstances brought on by the COVID-19 pandemic.

In a recent article, the political scientist Sylvain A. Lefèvre (2020) invites reflection on the COVID-19 pandemic beyond its economic impact, pointing out that it is “challenging the architecture of the social ties that connect us with each other, our way of ‘making society’” (p. 11).² Thinking about the changes that have taken place in the practice of volunteer activity, which is truly a “cornerstone of communitarian and mutual aid in our society” (p. 12), amounts to thinking about how a core part of our social fabric reinvents itself in times of crisis and about issues of community and regional resilience.

In every region of Québec, volunteers have come forward and formed groups to aid the most vulnerable among us. This article identifies the major impacts that COVID-19 has had on the voluntary sector in Québec. Specifically, it considers the major effects of COVID-19 on the make-up of the volunteer pool for community-based organizations and how the institutional infrastructure of volunteering is being redefined, both organizationally and ideologically. This infrastructure is made up of organizations and networks of organizations that act as intermediaries between volunteers (actual and potential) and organizations working on the ground (e.g., charities, community groups, public bodies) that need volunteers to function and offer their services. COVID-19 has resulted in a dramatic reimagining of the important social, economic, and political function of formal volunteering. While volunteering was previously conceived as an instrument for addressing social needs by and for the community, COVID-19 demanded an instrumentalized volunteer sector that could serve as a crutch for a society engaged in crisis management.

THEORETICAL FRAMEWORK: FORMAL VOLUNTEERING

Volunteering is generally understood as an altruistic behaviour or act. It is thought of as giving the gift of oneself (Mattei, 2007), which can take the form of specific acts such as giving blood or giving of one's time (Archambault & Prouteau, 2009; Prouteau & Wolff, 2008). Furthermore, as Dan Ferrand-Bechmann (1992) notes, volunteering “is not remunerated financially, and is carried out without social constraint nor sanction for the individual who chooses not to do it” (p. 35).

Similarly, Québec and French sociologists associated with the anti-utilitarian movement in the social sciences conceive of volunteer engagement from the angle of a free and free-time donation. They attribute political significance to the voluntary act, however, because it promotes the creation of social relations based on reciprocity (Godbout, 2002; Godbout & Caillé, 1995). As Jacques Godbout (2002) explains:

The volunteer attaches importance to the connection more than to the product, he grants time to time. And in this sense, he is opposed to the market. The act of volunteering, free and open, to a stranger is a radical protest against market globalization, which asserts that time is only money. (p. 46)

These classical definitions, which have a certain heuristic value when it comes to studying volunteers' inherent motivations, individualize the phenomenon of volunteering while simultaneously assigning it a singular meaning. This article takes a more holistic approach, examining volunteering not as an individual gesture but as an inherently social phenomenon that occurs within an organized and politically structured sector—a sector that regulates and co-ordinates the gifts of time and labour offered by individuals—and is embedded within the society it operates in. This distinction is important. As Eric Gagnon, Andrée Fortin, Amélie-Elsa Ferland-Raymond, and Annick Mercier (2013) explain:

Volunteering, as a specific set of activities, or a specific sphere in social life, with shared goals, as recognized by policies or by discourse, with its own organizations and being subject to assessment and evaluation, is a relatively recent phenomenon. Volunteerism did not exist 100 years ago; there were activities that were characterized as volunteer or charitable, but no volunteer sector. (p. 3)

This theoretical approach helps us reflect not merely on the interpersonal dynamics volunteering gives rise to but more generally on the social functions assumed by this form of commitment with regard to the production and reproduction of society. Such a posture implies being attentive to the fact that volunteering is “a reality in motion” (Thibault, Fortier, & Albertus, 2007, p. 7), and that its meanings and fields of action change over time and space (Gagnon & Fortin, 2002 ; Gagnon & Sévigny, 2000). In doing so, the socio-demographic, political, and cultural realities that constitute voluntary activity are subject to change as transformations or crises occur within society.

This study is motivated by the following question: in the Québec context, how does the social phenomenon of volunteering change in the face of crisis?

In the pre-COVID Québec context, volunteer action served two primary functions. First, the work of volunteers made it possible to significantly increase the number and extent of services available within a given community, particularly for disadvantaged populations or those with special needs (e.g., the elderly, people with disabilities, and people experiencing homelessness). These services meet material and social needs that, for various reasons, are not supported by state actors or private companies. Volunteering is, therefore, considered to play an active role in “social development” (Panet-Raymond, Rouffignat, & Dubois, 2002), a role that is explicitly recognized by the Québec government through its Government Volunteer Action Strategy 2016–2022 (Government of Québec, 2016). This notion of social development emphasizes how the production of services by volunteers goes hand in hand with the production of social links. As André Thibault, Julie Fortier, and Patrice Albertus (2007) explain:

Reporting on volunteering is not just about reporting on its output or functionality as a “workforce” providing services, hours, skills, etc. It is also about creating links and bridges between people who affect both “beneficiaries” and volunteers. (p. 13)

This view of volunteerism is in line with the United Nations' *State of the World's Volunteerism Report 2011*, which argues that volunteering “benefits both the whole of society and the person who volunteers by reinforcing confidence, solidarity and reciprocity among citizens and purposefully creating opportunities for participation” (Leigh, 2011, p. b). Volunteerism has for decades been considered a lever for social and community development (Peter & Sue, 2015). Indeed, for Jean-Michel Peter and Roger Sue (2015), volunteering has a direct impact on communities since it develops social connections and cohesion among individuals. This is also the case with the redefinition of the role of the state and its progressive disengagement from several areas of social action via austerity measures, the marketization of social services, and general processes of neoliberal restructuring.

The second primary function served by voluntary action also fuels and empowers social and community life. In addition to providing services and strengthening the social capital of communities (Putnam, 2000), volunteering increases individuals' "power to act socially" (Olin Wright, 2020, p. 160). Within modern volunteering, or what Belhassen Redjeb (2008) calls "neo-volunteering," volunteering is experienced and thought of as civic engagement and "thus constitutes an expression of a democratic and healthy society" (p. 74). This is particularly true for certain segments of the population in which voluntary work is seen as a means of integrating into the wider social structure in a socially useful way. This is the case with former prisoners or the elderly, for example. Retirement is sometimes synonymous with exclusion from working life, and becoming a volunteer offers a means to continue contributing to society or get involved in associations that take positions on collective issues that concern and challenge them (Carette & Lamont, 1988).

To accomplish these functions of social development and empowerment, volunteering has been institutionalized and professionalized in recent years (Redjeb, 2008; Tardif Bourgoïn, 2013). The mobilization, organization, and reproduction of the volunteer work force is supported and supervised by organizations and associations that call on managerial expertise. Volunteering cannot, therefore, be reduced to the sum of individual donations of time; it also depends on an institutional framework that ensures it is deployed in a coherent way in society. In this way, Gagnon et al. (2013) urge us to view voluntary action as

an institution that generates or supports these actions and gives them a place and legitimacy within society;
a set of federation and associations, of government policies and programs, of similar discourse and goals,
which regulate these actions, and give volunteers a common identity and similar experience. (p. 203)

In espousing a perspective that conceptualizes volunteering as an institutionalized sphere of activity—albeit one that is constantly evolving—it is necessary to make the distinction between formal volunteering (within a framework) and informal volunteering. Individuals who engage in formal volunteering provide services to others without remuneration through a group or organization at least once during a given year (Hall, Knighton, Reed, Bussière, McRae, & Bowen, 1998). Here, the voluntary sector or volunteer activity refer to this type of volunteering, in the sense that there is organizational mediation between the gift of time and labour and the beneficiaries of that gift. Informal volunteers, on the other hand, provide assistance of their own initiative, either directly to a person outside of their household or indirectly to a collectivity or in a particular setting, without a group or organization serving as intermediary (Duchesne, 1989). Family caregivers fall into this second category. While this latter form of volunteering has played an important role in maintaining communities' resilience during the COVID-19 crisis, this analysis is limited to formal volunteering.

METHODOLOGY

The methodological approach draws on triangulated sociological methods, such as semi-structured interviews, field observations, and document analysis. It seeks to document and understand a range of experiences and perspectives within and across various Québec voluntary sector organizations during the pandemic.

Field data collection

This article draws on two distinct forms of qualitative data (semi-structured interviews and field notes recorded during organizational webinars). First, from March 2020 to January 2021, semi-structured interviews were carried out with four individuals from four charitable organizations, each lasting approximately two hours. Two of these organizations—Paroles d'excluEs and the Welcome Hall Mission—have a pool of volunteers working on the ground, while the other two—the Fédération des centres d'action bénévole du Québec (FCABQ) and the Réseau de l'action bénévole du Québec (RABQ)—focus on promoting volunteer activity in Québec. These organizations were selected for the boldness and drive they displayed during the first two waves of the pandemic. The first group works in community philanthropy and alongside Québec's social services sector. The second group specializes in the management of volunteers and played a key role in the government's appeal for volunteers at the start of the pandemic.

Second, two webinars organized by Québec-based philanthropic organizations, focusing on volunteering in a pandemic—*Recruiting for the Red Cross. What Are the needs in a Pandemic* on May 7, 2020, co-organized by the Canadian Red Cross and Université du Québec à Montréal, and *COVID-19, Montréal-North and Philanthropic Response in Québec* on May 28, 2020, presented by Philanthropic Foundations Canada (PFC)—served as primary data sources. These webinars represent four hours of discussions with more than ten different organizations in Québec, as well as government officials, such as the mayor of the borough of Montréal-Nord and sector leaders from the Table de quartier de Montréal Nord, Centraide of Greater Montréal, and the Canadian Red Cross. Participants discussed a range of topics related to COVID-19, ranging from organizational challenges to volunteering needs. These webinars generated approximately ten pages of field notes.

Together, the interview data and webinar-based field data provide a nuanced illustration of the Québec volunteer sector's response to the COVID-19 pandemic. Interviews and webinar questions focused on topics such as how organizations operate during COVID-19, volunteering and volunteer resource management, and their contributions to local public welfare.

Documentary research

An in-depth analysis of organizational documents from the four aforementioned Québec-based charitable organizations was carried out, with a specific emphasis on organizational press releases (FCABQ, 2020a, 2020b, 2020c; RABQ, 2018, 2020a; Parole d'ExcluEs, 2020a). In total, 16 documents were selected for in-depth coding based on the following inclusion criteria: "volunteering in Montréal (or Québec)," "COVID-19," "community philanthropy," and "emergency solidarity." The final data set included mission statements, strategic plans (RABQ, 2020b; Welcome Hall Mission, 2020), program descriptions (Paroles d'ExcluEs, 2020b), newsletters, and social media posts (such as Twitter and Facebook) from the four main organizations dating back to the beginning of the pandemic.

Data analysis

Interviews were transcribed in their entirety and then coded according to a pre-established analysis grid (Comeau, 2000). Inductive coding of the documents began by focusing on the obvious content of the interviews (Miles & Huberman, 2003). Manual colour coding enabled the easy identification of major themes within the field data. These first order codes were grouped around the following categories: economic functions (the provision of services); social functions (the production of interpersonal links); and political functions (the development of citizenship). Second, a thematic content analysis was conducted to systematically study the relationship, interdependence, and interaction between the policies and practices developed by the selected case study organizations and the organizations that participated in the webinars. Third, themes were revised based on similarities and areas of tension. This yielded the following three topics: the background or context of volunteer activity and responses during the first lockdown; the integration and retention of volunteers through new policies and programs; and the institutionalization of a health-centric rationality in the structuring of volunteer work.

Results

The section presents the results of the fieldwork. They are organized into three stages: the impact of the first lockdown on volunteer activity in Québec; the integration and retention of volunteers through new policies and program; and the institutionalization of a health-centric rationality in the structuring of volunteer work. By presenting these results chronologically, it is possible to follow the metamorphosis of the sector during the crisis, starting with how the volunteer pool suddenly changed with confinement and social distancing through to the redefinition of the modalities of volunteer management implemented by the organizations.

The background or context of volunteer activity and responses during the first lockdown

As with all spheres of activity in Québec society, the volunteer sector was turned upside down on March 13, 2020, the

day the Québec government declared a health emergency and imposed a total lockdown in the province. The shock waves that hit Québec's economic and social life also immediately impacted the pool of available volunteers, which was suddenly significantly diminished. This was due to the fact that seniors, a group especially vulnerable to the effects of the SARS-CoV-2 virus, are the most active in formal volunteering. As noted by Tara Hahmann, Valerie du Plessis, and Patric Fournier-Savard (2020), in 2018, individuals from the Silent Generation (40%) and Baby Boomers (31%) were more likely than those of the Internet Generation (18%) to be among those considered primary volunteers by having devoted 132 hours or more to volunteer activity.³ Volunteer numbers and hours declined for three out of five charities during COVID-19 (Lasby, 2021).

Out of concern for their safety, most organizations advised their volunteers aged 70 and older to stay home, in accordance with public health directives. For Québec's Centres d'actions bénévoles (CABs) (volunteer action centres), this resulted in a loss of about 80 percent of their volunteer pool during the first wave of the pandemic.

Some sectors of the economy had to shut down their activity to help slow the spread of the virus. In these sectors, considered "non-essential," all volunteer activity had to pause. The culture and leisure sectors were the hardest hit by these constraints, leisure being, by far, the sector that attracts the largest percentage of volunteers. In 2018, 37 percent of Québec volunteers reported having been involved with organizations in this sector (Fournier, 2018). In short, a very significant number of volunteers found themselves in a work stoppage, thereby instantly losing the many benefits they gleaned from this type of involvement in society.

The magnitude of the impact of the lockdown on volunteer activity should not be underestimated: CABs put a stop to 93 percent of the 80 services that are generally widely offered to the public. Only three major CAB services were declared essential when the health crisis took hold: the home delivery of meals, friendly visits, and transport and accompaniment. Thus, the volunteer sector was mainly called upon to intervene in services that aimed to protect the most vulnerable and, a fortiori, the elderly. As one representative from the Montréal-based Welcome Hall Mission points out:

Welcome Hall Mission offers essential housing services in several areas in Montréal but also emergency food aid for the most vulnerable individuals. When the pandemic hit, we had to adjust rapidly to not leave anyone in dire straits. We started up new services, which we were able to provide thanks to our volunteers, like the home delivery of food baskets. As well, the government contacted us to ask us to put in place additional shelters in the downtown area, such as the one that was set up in the Place Dupuis Hotel for homeless individuals.⁴

In this difficult situation, the challenge became to find and mobilize volunteers who could ensure the provision of the three aforementioned essential services: meal delivery, friendly visits, and transport and accompaniment. It became urgent to replace the elderly in the volunteer pool while ensuring their basic needs were met. To do that, public authorities put out a call asking all individuals who were healthy, under 70 years of age, and had some spare time to offer their time to organizations that were now lacking resources. On March 26, 2020, at a press conference organized by the government of Québec and public health authorities,⁵ Premier François Legault and Jean Boulet, minister of Labour, Employment and Social Solidarity, called on the public to show its solidarity by signing up with volunteer banks. On the recommendation of the RABQ, the government's privileged partner in matters of volunteer activity, individuals interested in volunteering were invited to submit applications via Je Bénévole, a virtual matching platform managed by the FCABQ.

The population of Québec responded very positively to this appeal. In the two weeks following the press conference—from March 26 to April 14—more than 20,000 people registered. "From that moment on," explains the FCABQ's director, "we saw a complete reversal in volunteering trends: the pool of candidates for volunteering was now too large relative to available opportunities. We had never seen that before."

Given that the health-related restrictions mostly applied to older people and because individuals who had been forced into unemployment suddenly saw their schedules free up, efforts to solicit help did not necessarily connect with the same public as usual. A Welcome Hall Mission representative puts it this way: “Our seniors gradually stopped volunteering, and new volunteers appeared subsequent to the government’s appeal. Mostly students, and salaried employees whose businesses had shut down.”

According to the FCABQ’s director, the dominant age group accessing Je Bénévole in this first wave were neither the oldest (the Baby Boomers) nor the youngest (Generation Y)⁶ but rather those between 40 and 60 years of age—in other words, Generation Xers. According to a participant from the *COVID-19, Montréal-North and Philanthropic Response in Québec* webinar, “For some young people, it was a good time to start volunteering. The crisis only reinforced their desire to act.”

When organizations had to close during the first lockdown in March 2020, spontaneous initiatives propelled by volunteers sprang up in certain neighbourhoods where community-based philanthropy and solidarity were already strong. These types of bottom-up initiatives aimed to make up for the temporary absence of groups that were transitioning toward telecommuting. For instance, Welcome Hall Mission was able to develop a new delivery service—which did not exist prior to the pandemic—thanks to the unwavering commitment of volunteers. This new initiative has brought about an improvement in the organization’s level of service, a change that Welcome Hall Mission hopes to maintain in the years to come to help the elderly as well as persons suffering from serious illness. The same phenomenon of bottom-up volunteer-based organizing was observed at Paroles d’excluEs, a Montréal-based charity that combats poverty and social exclusion:

This new group spontaneously, and very rapidly, established a chain of solidarity, initially based on communication by phone. People would call each other to check in, to make sure that all was going well, despite the circumstances. Then, we started to see “clandestine” exchanges of food, based on each person’s needs. A can of peas for a can of baked beans and so on. At the same time, a small group of citizens formed to take care of errands for others who could not leave their homes. Manon and Céline L. on that team stored food at their home since we could not open our office. Céline B and Guy were constantly coming and going; they took some risks by doing errands and making deliveries even though we didn’t yet have protective equipment (masks, gloves, face shields) for them. And all this came about in a week!

Managing volunteers in a pandemic presented the sector with a dual challenge: new volunteers had to be integrated rapidly, yet organizations had to make sure all these people could work without compromising their safety, the safety of their families, and the safety of the organization’s clients.

The integration and retention of volunteers in a pandemic

The CABs’ priority was to match new candidates with organizations in need. Many candidates were indeed recruited; however, the new pool of volunteers was simply too large relative to sector’s capacity to integrate them. As the FCABQ’s director notes:

CABs normally do have the resources needed to be able to give volunteers the structure they need, but the influx from March 26 and April 14 was simply too big—contacting and placing the 20,000 people who registered in two weeks was beyond our organizational capacity. For the CAB, managing the volunteer bank generated by Je Bénévole, orienting the people who contacted us wanting to get involved, etc., took up a lot of time and really made a dent in our resources.

That said, the number of individuals integrated into the voluntary sector is substantial. From the time of the government’s appeal on March 26 until the end of 2020, about 40,000 applications were submitted to Je Bénévole. Roughly half of the applicants were accepted and integrated into the sector. The processing of the applications generated a paradoxical situation: volunteers had to be recruited and mobilized to meet urgent needs, but organizations that needed them still had

to carefully analyze their files to retain the most qualified individuals for the open positions. A major issue arose with regards to the verification of candidates' criminal records, which is a mandatory procedure in sectors where volunteers are working with vulnerable populations. The police are responsible for carrying out these checks, but verifications were not always done within a reasonable timeframe and some recruitment efforts were blocked. The RABQ's director explained that in some instances she had to intervene with the Ministère de la sécurité publique to get the police department involved to speed up the verification process.

In the long term, the issue for this sector will be retaining these new volunteers. "Our challenge is going to be to keep these people volunteering," explains the RABQ's director. "For some of them, it's probably the first time that they have even thought of giving their time because they had a lot of time on their hands all of a sudden—they either went on unemployment or were receiving CERB".⁷ Those in charge at FCABQ and Welcome Hall Mission agree. For the FCABQ's director, the big challenge will be keeping new recruits mobilized to meet the many needs that remain when the pandemic is over.

The Welcome Hall Mission is certain that some of these new recruits will continue to be active in 2021. However, some doubt remains regarding students and individuals who are between jobs as a direct consequence of the health crisis. As a result, many in the sector are engaged in serious reflection on how to rethink the terms and conditions of engagement so that volunteering can stay compatible with the regular schedules of workers and students. Otherwise, the return to "normalcy" might well translate into the complete disengagement of the volunteer pool. The director of the FCABQ notes:

We have to adjust our way of organizing volunteering. We have seen that it is possible to attract more than 30,000 candidacies since many people are not working. But we also know that several organizations offer volunteers time slots within the Monday-to-Friday, nine-to-five timeframe. The crisis has shown us that this type of scheduling does not really line up with the availability of people who work. We have less of the kind of volunteer who comes week after week, and that was happening even prior to the crisis. We, therefore, have to adjust our offer and demonstrate more flexibility in order to adapt to the realities of different kinds of volunteers.

When it comes to the volunteers who had to temporarily stop their volunteer activities, the challenge will be to make sure that the current crisis does not result in their demobilization. This challenge is currently generating a fair amount of anxiety, especially in the sports, culture, and recreation sectors. These are the spheres of activity that have suffered the most from the lockdown and social distancing measures. The return to service of volunteers will be a key condition of charitable organizations being able to resume their activities once organizations in the sports, culture, and recreation sectors are allowed to reopen.

Among those making proposals regarding the reintegration of these volunteers, some are speaking out to say that the category of volunteer activity considered "essential" needs to be broadened. For example, the Conseil québécois du loisir, an RABQ member, recently published an open letter as part of an awareness campaign called *Le loisir, un service essentiel* in which it asks that leisure be considered an essential service. To quote the conseil: "its benefits (those of recreational activity) are well known when it comes to preventive health, but it also has educational value, serves as a cultural vector, and promotes social inclusion for young people, seniors, and disabled individuals" (Conseil québécois du loisir, 2020).

Both the RABQ and the FCABQ support this position and argue that the essential character of volunteer work in fields such as recreation should be recognized. There should, as well, be a general acknowledgement of the fact that volunteering is a vector for social integration. In this vein, the FCABQ makes the case for allowing older volunteers to resume their involvement. "During a lengthy period of time, the government said that people over 70 could not engage in volunteer work," explains the federation's director. "On our end, we frequently went back to the government on that point, because volunteers aged 70 and over want to start volunteering again. For them, volunteering is on a fundamental level an activity that does them good."

Health-centric rationality in the structuring of volunteer work

After the integration of new volunteers, the sector's second major challenge was to structure volunteer work in a way that would allow volunteers to offer essential services in a safe environment and without too many complications. The continuation of services offered by volunteers came with a price, a health-centric rationality that radically transformed the day-to-day experience associated with this kind of social involvement. These adjustments to the structuring of volunteer work to deal with the risk of contamination happened on four levels.

First, organizations had to completely rethink the usage of their facilities. From the start of the first wave of the pandemic, they closed off access to their facilities to prevent any outbreaks. This measure created both logistical and social problems. Logistically, it made it more difficult to carry out activities that normally occur indoors, such as meetings or assemblies. In the case of CABs, for example, their facilities often include kitchens where meals for meals-on-wheels are prepared. In order to respect social distancing measures, cooks had to prepare meals by themselves, without help from volunteers. But on a deeper human level, the closure of organizational facilities hindered volunteer socialization. As one Paroles d'excluEs representative explains:

You have to understand that our two sites are meeting places and spaces for sharing where people can bring forward ideas and propose projects, though they are not just that. They are also spaces that help break down social isolation. Unfortunately, on March 13 we had to close our premises. ... Still, despite the challenges presented by the lockdown, Parole d'excluEs was able to continue to reach the most vulnerable individuals, thanks to the support of very committed citizens [this organization refers to its volunteers as *citizens*]. ... These individuals are our "eyes and ears" on the ground; they are essential.

This can be said of all CABs, which serve as spaces for volunteers to meet and socialize with each other and staff.

Second, organizations took on the task of redeploying services virtually where possible. Tele-volunteering became the method of choice for several types of services. To take one example, CABs generally provide friendly visits to the elderly. These drop-ins help break down social isolation. They also offer the chance to make sure that the senior's needs are taken care of and, when necessary, provide an opportunity to refer them to relevant organizations. Given the importance of these drop-in visits to seniors' well-being, the decision was made to reimagine these visits as "friendly calls." Numerous volunteers were mobilized to make support calls and keep the lines of communication with vulnerable groups open and stay attuned to their needs. However, as our Parole d'excluEs representative points out:

During the pandemic, I saw people give up their phone service for financial reasons. Their isolation becomes even more acute! How can you have exchanges with other people, get news, and, of course, get the information you need? This is a major issue.

Third, for services that had to be offered in person, there was a need to make protective equipment available to reduce the risk of contamination. Organizations absolutely did not want new volunteers to be vectors for spreading the virus. An initial problem during the first wave of the pandemic was the scarcity of personal protective equipment, such as specialized masks. Additionally, organizations had to ensure that volunteers received the proper training, the nature of which varied according to the working environment. Training was needed not only on a professional level but also for the hygiene measures. For meals-on-wheels deliveries, for instance, volunteers were directed to leave the meals on a porch or stoop to avoid contact with recipients. But what was gained in terms of safety was lost in terms of the quality of person-to-person interaction, which is often an integral part of the aid that volunteers provide. Here is how the director of the FCABQ puts it:

Yes, there is the delivery of a meal, but there is also everything associated with it. In other words, checking in with the elderly individual, who is often alone and vulnerable, and making sure they are alright. It is often during the delivery activity that volunteers detect other problems going on with the older person. They can then refer them to other services. With the pandemic, that kind of extra step was not possible.

The fourth and final challenge was for organizations to take charge of and see to the well-being of their volunteers. That well-being was severely tested by the anxiety-provoking climate and the health measures that had been imposed, which negatively impacted the quality of volunteer engagement. In that vein, organizations such as Paroles d'excluEs saw to it that their members could receive psychological support following the first wave of the pandemic. "At that point, morale was pretty low, so we made more psychological support available," the representative reports. "We organized a workshop, 'How to Come out of Lockdown in a Healthy Way?' We also offered online group sessions with a psychologist."

On top of offering direct support to volunteers, organizations also spoke out publicly to denounce the conditions volunteers had to work in. The FCABQ's director drew a lot of attention in the media with his criticism of the fact that, in many regions of Québec, volunteers providing transport could not go inside a hospital with beneficiaries and had to spend several hours waiting in their cars (Porter, 2020). The FCABQ urged the authorities to rapidly arrange for waiting areas in hospitals to accommodate volunteers to avoid discouraging them from offering this vital form of assistance. In short, on many levels, the sector made an effort to lessen any complications and inconveniences caused by health measures that might impair the work of volunteers.

DISCUSSION

As we indicated in the theoretical framework, formal volunteering serves three main functions in society: an economic function, because it provides free labour that increases the supply of services to society thus contributing to community development (Panet-Raymond, Rouffignat, & Dubois, 2002); a social function, because volunteer involvement produces bonds of solidarity (Godbout, 2002; Godbout & Caillé, 1995); and a political function, because volunteer involvement serves as a means for certain individuals or groups to gain recognition in the public arena while simultaneously developing their power to act (Carette & Lamont, 1988; Redjeb, 2008). How should the changes in volunteering in Québec amid the COVID-19 pandemic be qualified? How has volunteering restructured itself to maintain or redefine the three major functions through which it contributes to the production and reproduction of the "collective architecture of solidarities" (Lefèvre, 2020, online).

In classifying and interpreting the meaning of this study data along these constitutive dimensions of volunteering, volunteering still performed economic, social, and political functions during COVID-19, but the meaning and purpose of these functions were quite different. This research shows that in the context of this health crisis, an entirely new politico-managerial rationale emerged, sparked by urgency and the necessity to meet the basic needs of vulnerable populations. A new societal configuration emerged, in which voluntary action is institutionally and politically framed to carry out its fundamental functions differently.

Social and economic functions

The economic and social functions of volunteering are often seen as inseparable, as the production of social ties are intimately linked to the provision of services. It is interesting to observe, however, that this shift in the purposes of voluntary action was done at the expense of the social dimension that is intrinsic to it. First, with regard to the sector's social development function, study results show that health constraints often had the effect of sacrificing spaces and moments typically dedicated to the creation of social relations that spill over to benefit service delivery. During COVID-19, volunteers were not allowed to meet and socialize with each other on agency premises, and physical distancing measures affected the quality of the relationships they had with their beneficiaries. By thus prioritizing the economic over the social, volunteer work has moved away from the logic of giving that gives it meaning (Godbout, 2002). Nevertheless, setting of tele-volunteering has made it possible, to some extent, to pursue certain activities focused on the production of social links for populations who suffer from isolation or require psychological support. What was more prominent on this social level,

however, was the role of the sector in supporting community and societal resilience in times of crisis. Thus, when registered charities closed their premises while transitioning into the first lockdown, volunteers gave their time to intervene in neighbourhoods as key local actors. They were indispensable players in strengthening resilience in their communities and across the province. Ultimately, their contribution was more about maintaining social cohesion—with the aim to provide essential services to as many people as possible—than about generating interpersonal relationships among volunteers and between volunteers and beneficiaries.

Political function

With regard to the volunteer sector's political function of empowering individuals, the demarcation of voluntary activities to so-called essential services has been done at the sacrifice of a large number of voluntary activities promoting participation to public and cultural life. As observers who recall that the parliamentary process have been paralyzed (Descoteaux, Néméh-Nombré, & Pierre, 2021), it should be remembered that the state of emergency has also affected the democratic life on the ground in associations, advocacy or interest groups, and social movements. While volunteering normally constitutes the cornerstone of a healthy associative democracy, in the context of a health crisis, it took on more of the appearance of a civic duty ordered by the state than a true manifestation of citizenship (Redjeb, 1991).

In sum, volunteering was previously conceived of as an instrument for addressing social needs by and for the community—in other words, as a means of social and political action independent of the state. With the COVID-19 pandemic, the work of old and new volunteers was instead instrumentalized because of the regulations put in place, thus returning voluntary action to the role of a crutch for a public sector engulfed in crisis management. To briefly illustrate the shift from one logic of voluntary action to another in the face of the crisis, Figure 1 compares the economic, social, and political functions of voluntary action as pursued before the pandemic and during the first months of the pandemic.

Figure 1: The economic, social, and political functions of formal volunteering before the pandemic versus during the pandemic (first and second wave)

	Formal volunteering before COVID-19	Formal volunteering during COVID-19
Economic function	Contribution of volunteers in all spheres of activity of the company.	Limitation of volunteer activities to services declared essential by the state.
Social function	Creation of social links between volunteers, and between volunteers and service recipients.	Strengthening the resilience of populations most affected by the effects of the crisis.
Political function	Promotes the vitality of democratic life and the recognition of individuals or groups in the public space.	Takes the form of a citizen's duty to accompany the public sector in its management of the crisis.

While the crisis shows an increase in the complexity of the aims of voluntary action, the cohabitation of its traditional functions with this new function is not self-evident—the latter can encroach on the former. In future crises, would it be possible to think collectively about a better conciliation between the imperatives of the present (the resilience function of volunteering) and the importance of preserving social ties and the political requirements of a society that wants to be democratic?

Although still exploratory, this research helps assess the main institutional changes that have occurred in voluntary action. The analysis reveals that volunteering is a dynamic institution with interventions can be deployed in various ways to respond to novel needs generated by a crisis. At a more micro-sociological level, however, this analysis does not make it possible to make claims regarding the range of motivations that led so many individuals to volunteer in organizations

when the risk of illness was significant, nor does it reveal the meaning that volunteers gave to their commitment to volunteering as it evolved during the pandemic. Future research on the voluntary sector during COVID-19 should pursue these lines of study. Such research would enrich these results and be very useful for the sector—especially for managers who face significant challenges in terms of soliciting and retaining volunteers.

CONCLUSION

As COVID-19 will not be the last crisis, it is necessary to be conscious of the fact that volunteers will be playing an increasingly important role in disaster risk reduction, disaster management, and, more broadly, humanitarian emergencies (McLennan, Whittaker, & Handmer, 2016). Discussions focused on this kind of episodic volunteering during the pandemic (both the first and second waves) have brought several notions to the forefront.

First, there is a need to be able to quickly activate a pool of competent volunteers. Governments, community groups, and registered charities must work together to determine how to mobilize them in a formal framework that is safe. However, registered charities and the community sector desperately need increased funding to achieve this and to support community-based projects. These latter projects are often conceived by volunteers, who frequently have a more fine-grained perspective on solutions that is shaped by community-specific knowledge and established social ties and relationships.

At the core of community-based work is a diversity of community organizations and volunteers offering a variety of services, including helping persons experiencing homelessness; distributing food baskets; providing services to individuals with mental health issues; and helping to keep shelters open for women who are victims of violence. It is urgent to keep moving ahead on the recognition of volunteer work as an essential service and an indispensable factor in community resilience, particularly in times of crisis. Many strategies are possible. For example, employers and universities could be incentivized to create conditions favourable to volunteerism as is already the case, to some extent, in Québec schools.⁸ Similarly, government could create more honours and awards for volunteer service.⁹ Above all, however, governments and philanthropic funders (such as grantmaking foundations) must rethink their strategies for allocating funds to maximize liquidity for frontline organizations.

The pandemic has revealed that Québec is home to a mature voluntary sector, capable of rapidly mobilizing and organizing a large and cost-free labour force for a long period of time (10 months of pandemic). The challenges that the sector faces as a result of COVID-19 are not necessarily new; rather, they were already part of a pre-pandemic landscape where there was a dearth of fundamental responses to major issues, such as access to food and healthcare, economic challenges concentrated in areas such as Montréal North, the fight to reduce the digital divide, and the reworking of the public income security to implement a decent guaranteed minimum income.

Notes

1. There has been a slight decline since 2010. According to Statistics Canada, 13.3 million people, 47% of Canadians 15 years and over, volunteered in 2010. That represents about 2.07 billion hours, the equivalent of slightly fewer than 1.1 million full-time jobs (Vézina & Crompton, 2012).
2. This has been translated by the authors.
3. The Silent Generation is generally defined as people born from 1928 to 1945 (from 75 to 92 years old). The Baby Boomers generation is generally defined as people born from 1946 to 1964 (from 56 to 74 years old). The Internet Generation includes Generation Y, also called the Millennials (born 1980 to the late 1990s) and Generation Z (born in the early 2000s and on).
4. All the interviews were conducted in French; they have been translated by the authors.

5. The Québec government's daily press conferences drew a huge audience. *La Presse's* numbers show that: "between March 13 and May 4, an average of 2.1 million Québécois listened in on the Legault-Arruda-McCann interventions between 1 and 1:30 p.m" (Marquis, 2020, para. 2).
6. Engagement on the part of students and young workers should not be underestimated. With the closing of postsecondary schools and many businesses, Hahmann et al. (2020) observed increased participation among this age group: "While those in Generation Internet were less likely than others to be among the main volunteers, they did participate in a significant way in formal volunteer activity at the start of the pandemic" (p. 5).
7. The Canadian Emergency Relief Benefit (CERB) provided financial aid to employees and independent Canadian workers who were directly affected by COVID-19. Those eligible received a payment of \$2,000 for a four-week period (the equivalent of \$500 per week) between March 15 and September 26, 2020 (Canada, n.d.).
8. The *Stratégie d'action jeunesse 2006-2009*, renewed for 2009–2014, states that "recognition and rewarding of citizen participation, and the creation of spaces for sharing, create the right conditions for volunteering to become contagious" (Gouvernement du Québec, 2009, p. 49). The strategy acknowledges the importance of encouraging youth to volunteer in their day-to-day environments. The Ministère de l'Éducation, du Loisir et du Sport committed to developing a framework for recognizing students' involvement in volunteer activity.
9. There is currently a Prix Hommage-Bénévolat Québec. According to the Ministère du Travail, de l'Emploi et de la Solidarité sociale, this honour, awarded by the government of Québec, highlights the extraordinary commitment of volunteers and organizations across the province who make a real difference in their communities.

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Centraide of Greater Montréal, <https://www.centraide-mtl.org/en/>
Fédération des centres d'action bénévole du Québec, <https://www.fcabq.org/>
Je Bénévole, <https://www.jebenevole.ca/>
Paroles d'excluEs, <http://www.parole-dexclues.ca/>
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Attempting to Address Conditions of Poverty through an Inclusive Economic Approach in Alberta

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ABSTRACT

This article responds to the call to alter current economic and social systems in light of COVID-19 by documenting initial efforts by a community-university partnership to build an inclusive economy. First, the effects of neoliberalism and oil extraction are examined to highlight the inequality that existed in Alberta long before the pandemic began. The paper then outlines four key areas of change: employment and training; social procurement and community benefits agreements; living wages; and basic income. It concludes with some initial learnings that may have resonance for others attempting to stimulate economic practices that distribute wealth more equitably.

RÉSUMÉ

Cet article répond à un désir de modifier les systèmes économiques et sociaux actuels en conséquence du COVID-19. Il le fait en décrivant des efforts préliminaires de la part d'un partenariat communauté/université pour établir une économie qui soit plus inclusive. L'article examine d'abord les conséquences du néolibéralisme et de l'extraction du pétrole afin de souligner les inégalités qui existaient déjà en Alberta bien avant le début de la pandémie. L'article présente ensuite quatre domaines clés qu'on aurait besoin de modifier : l'emploi et la formation; les ententes sur l'approvisionnement social et sur les avantages communautaires; le salaire de subsistance; et le revenu de base. L'article conclut en faisant des observations préliminaires qui pourrait inspirer d'autres individus tentant d'encourager des pratiques économiques orientées vers une distribution plus équitable de la richesse.

Keywords / Mots clés : Poverty; Precarity; Inequality; Inclusivity; Economy / Pauvreté; Précarité; Inégalité; Inclusivité; Économie

INTRODUCTION

The COVID-19 pandemic has drastically reshaped economic and social realities across Canada and further highlighted the inadequacy of existing economic and social systems to protect against poverty (Findlay, Saulnier, & Stratford, 2020). Early into the pandemic, Jorge Sousa and Marco Alberio (2020) called for deep reflection to consider the ways we can learn from the experiences of the pandemic and build new structures and practices that transcend the status quo. In light of this call, this article examines and critiques initial efforts to create an inclusive economy through a community-university partnership comprised of researchers and practitioners working in the area of poverty reduction. Specifically, the part-

nership sought to respond to the question, “to what extent might the creation of an inclusive economy be possible as a way to mitigate precarity and poverty?”

This article first situates the work by describing the community-university partnership, and then outlines Alberta’s economic and social context—prior to and since the start of the pandemic—with a particular focus on neoliberalism, petroculture, and the role they both play in exacerbating conditions of inequality and poverty. It then broadly outlines the concept of an inclusive economy, and the ways the partnership is attempting to create one in Edmonton. Finally, it discusses some of the challenges experienced in the early stages of this work in the hopes it can support others attempting to shape economic recovery and address the underlying systems and politics that have led us here.

COMMUNITY-UNIVERSITY PARTNERSHIP

The community-university partnership involves a collaboration between EndPovertyEdmonton and the Community-University Partnership for the Study of Children, Youth, and Families (CUP). EndPovertyEdmonton is a community-wide initiative working to eliminate poverty in Edmonton by tackling the root causes, including shifting dominant societal values about poverty’s causes and solutions. The initiative was created by a taskforce involving stakeholders from funding agencies, universities (including one of the authors on this article), nonprofit organizations, and municipal government, all with an interest in addressing poverty. The mayor of Edmonton also endorsed the taskforce and EndPovertyEdmonton, and the City of Edmonton has been a primary funder and strategic partner of EndPovertyEdmonton since its development, with ongoing representation on the steering committee and other advisory committees. Through these close partnerships with the municipality and other community organizations, EndPovertyEdmonton’s work is organized around six “game changers”: liveable incomes, affordable housing, accessible and affordable transit, affordable and quality childcare, access to mental health services, and eliminating racism. To mobilize efforts in these areas, EndPovertyEdmonton operates as a convening entity, intended to increase investment in poverty elimination, mobilize collective efforts, and advocate for policy and systems change.

During an intensive strategic planning process conducted in early 2020, just as the effects of the COVID-19 crisis were becoming more obvious, EndPovertyEdmonton identified liveable incomes as a priority area. This decision was made in the recognition that having a sufficient income—whether via a living wage through employment or reliable social security—is essential for meeting basic needs and accessing services, such as quality childcare, housing, and transit, that can provide an exit out of poverty. Work within the liveable incomes priority area aims to ensure that all residents of Edmonton have basic financial security that facilitates participation in the community and supports peoples’ dignity (Edmonton Social Planning Council, 2019a). This shift in prioritization gained the support of municipal, community-based, and funding partners who sit on the steering committee. The City of Edmonton has been working closely with the staff of EndPovertyEdmonton, particularly in the area of social procurement, to better understand how procurement policies can be implemented to support equity.

Research is a core aspect of the partnership’s work, as it helps to situate practice-based efforts within a broader knowledge context. As such, research informs decision-making in the development of strategies and initiatives by drawing on lessons learned elsewhere and asking questions locally. EndPovertyEdmonton’s research is supported by partners at CUP, a research entity at the University of Alberta that uses a community-based research approach to generate mutually beneficial knowledge in collaboration with stakeholders from community agencies, governments, and funding agencies (Israel, Eng, Shulz, & Parker, 2013; Minkler & Wallerstein, 2018). CUP has been involved in poverty-related research since 2001 and was present at the decision-making tables in the creation of EndPovertyEdmonton in 2012. Since this time, CUP has worked directly in partnership with EndPovertyEdmonton to inform poverty-reduction efforts in Edmonton. This has created a foundation for the current collaborative work in the creation of an inclusive economy.

THE CASE FOR A NEW ECONOMIC APPROACH

The following section describes the Alberta context to situate the specific need for an inclusive economy in Edmonton. It also shows how these provincial influences unfold in a municipality to facilitate or limit potential opportunities for creating an inclusive economy at the local level. Although this work is situated in Alberta, it has relevance to provinces and municipalities across Canada because the conditions that give rise to the need for an inclusive economic approach are prevalent across jurisdictions, even as they present in unique ways in different contexts. What occurs in Alberta is inextricably connected to the rest of Canada (Shrivastava, 2015), with local histories offering a great deal of insight into the patterns and tendencies of a broader society.

Neoliberalism is first discussed as an ideology that rapidly gained traction over the last several decades and has become formidable, not only in Canada but globally. This is followed by a look at the effects of a dominant petroculture in Alberta (and Canada), which is intricately tied to neoliberal ideology in ways that perpetuate and exacerbate economic and social inequalities at the local level. It is important to highlight here that as a settler colonial state, Canada is founded on the dispossession and displacement of Indigenous peoples (Tomiak, 2017). A full analysis of colonization is outside the scope of this article, but it must be understood as the basis for both the past and current state of capitalism in Canada and, therefore, as inextricably connected to neoliberalism and oil extraction in Alberta (McCormack & Gordon, 2020; Preston, 2017).

Neoliberalism

This section provides a brief overview of neoliberalism and its effects over previous decades to illustrate the already weakened social systems that existed before COVID-19, which has resulted in intensifying economic precarity for many (Hillel, 2020).

Neoliberal politics

Neoliberalism is generally considered a political and social era that began in the late 1970s and early 1980s and continues in full force today (Cummins, 2018; Keil, 2002). First introduced by Ronald Reagan and Margaret Thatcher in the United States and United Kingdom, respectively, neoliberal politics have since been widely adopted by Western governments around the world, including in Canada (Keil, 2002). Defined by Wendy Lerner (2006) as a set of policies, ideologies, and governmentalities, neoliberalism arose in opposition to more interventionist approaches that followed World War II, such as Keynesian economic policies. Keynesian economics, and other similar interventionist approaches, sought to redistribute wealth, reduce inequality, and protect the most vulnerable Canadians (Navarro, 1998), though it is important to recognize that many racialized individuals were still excluded from this category of “Canadian,” even during the welfare state era (Thobani, 2007; Wacquant, 2009).

At its core, neoliberalism is characterized by the belief that state intervention undermines economic and social development (Navarro, 1998). Neoliberal policies, therefore, purport to improve the efficiency of economies through government downsizing and “deregulation” while supporting substantial government intervention (Hallstrom, 2018). Further, neoliberalism seeks to expand competitive market forces into new areas, leading to the “marketization” (and privatization) of public services under a mantra of choice (Cummins, 2018).

Austerity measures

Within this free-market ideology, public deficits are viewed as inherently negative (Navarro, 1998). Neoliberal governments thereby rely on austerity measures and financial cuts to reduce budget deficits, which serves to erode the welfare state while simultaneously delegating responsibility for social services to nonprofit organizations (Navarro, 1998). In Alberta, neoliberal efforts were introduced most fervently during the Ralph Klein era in the 1990s with a drive to “balance the budget” and address Alberta’s “spending problem”; rhetoric introduced to justify policy decisions (Brownsey, 2018). Among a range of social and cultural impacts, Klein’s neoliberal politics led to defunding kindergarten education, closing hospitals,

cutting social assistance and social programs and tightening eligibility requirements, privatizing public services, reducing corporate taxes, and replacing a progressive tax with a 10 percent flat tax (Brownsey, 2018; Shrivastava & Stefanick, 2015). In Edmonton, the human services sector has felt the effects of these austerity measures, with nonprofit organizations expected to address increasingly compounded problems with fewer resources and limited staff capacity (Edmonton Chamber of Voluntary Organizations, 2016). Further, as these organizations are largely reliant on government funding, a significant portion of their limited resources are spent applying for and administering grants at the expense of front-line services (Harrison & Weber, 2015). This dependence on government funding also means that nonprofit organizations in Edmonton have less flexibility to respond to community needs and are compelled to provide services in ways that align with government mandates (Edmonton Chamber of Voluntary Organizations, 2021).

Personal responsibility

In addition to weakening economic and social security structures, neoliberal governance has fostered and perpetuated an ideology that advocates personal responsibility. Individuals living in poverty come to be blamed for their own material circumstances (Cummins, 2018; Dixon, 2012). Loïc Wacquant (2009) has referred to such policies as “neo-Darwinist” (p. 5) in the ways they serve to promote societal competition and individualism. This individualistic and meritocratic culture is pervasive in Alberta (Hallstrom, 2018) and serves to perpetuate the fallacy of the self-sufficient, hard-working, and independent individual while stigmatizing and “othering” those who cannot succeed under such circumstances due to structural barriers (Cummins, 2018; Dixon, 2012). In Edmonton, discourses such as these create significant barriers to poverty-reduction work. With a widespread perception that employment and wealth are readily available in an oil-rich province, many people believe poverty does not exist in the city or that those living in poverty are to blame for their own circumstances (City of Edmonton, 2019). Not only must poverty reduction efforts in Edmonton seek to address structural barriers such as affordable housing and food insecurity, resources must also be allocated to shifting public consciousness around the need to invest in this area (EndPovertyEdmonton, 2020). The continued dominance of neoliberalism in Alberta is also further complicated by the presence of and reliance on bitumen oil as a central economic (and, therefore, political, social, and cultural) force.

Petroculture

While the first major natural gas discovery in Alberta was made in 1908, it was the 1947 discovery of oil in Leduc, a small municipality outside of Edmonton, that would transform Alberta’s economic future. This discovery led to rapid urbanization, economic growth, and a substantial increase in the province’s population (Fraser, Mannani, & Stefanick, 2015). Since then, Alberta’s economy has become almost entirely dependent on oil and gas, which account for 70 percent of the province’s exports (Shrivastava, 2015). Although Alberta’s economy has always been based on a single, dominant commodity (e.g., wheat, beef), the ubiquitous demand for oil has resulted in its suppliers having an excessive amount of power in both the market and political sphere (Shrivastava & Stefanick, 2015).

Economic, political, social, and cultural life

As with neoliberalism, the presence of oil in Alberta is not simply a matter of economics. Oil and non-renewable energy production are part of a larger petroculture that shapes the economic, political, social, and cultural life of the province and the cities within it (Shrivastava, 2018). Not only does the oil industry play a substantial role in Alberta’s politics, directly and indirectly (Foster & Barneston, 2015), many Albertans identify so strongly with oil they believe it inherent to their well-being (Harrison, 2015). This has largely protected the oil industry from external and internal criticism, and it has allowed oil companies an inordinate amount of power (Shrivastava & Stefanick, 2015). Combined with a largely uninterrupted conservative party rule for more than 80 years, along with entrenched neoliberal politics in the last several decades, this has resulted in Alberta becoming a right-wing corporatist state through which there is little to distinguish the interests of governments from those of private corporations (Harrison, 2015; Shrivastava & Stefanick, 2015).

Economic and social inequalities

Alberta's economic dependence on oil is of particular significance because it interconnects and overlaps with neoliberal ideology to perpetuate and exacerbate economic and social inequalities. Although Alberta stands as one of the wealthiest provinces in Canada, this wealth is not equally distributed. As such, Alberta has the highest rates of inequality of any Canadian province, with the wealthiest one percent drawing incomes over 46 times those of the poorest ten percent (Flanagan, 2015; Graff McRae, 2017). Income inequality is also high in Edmonton. Between 1982 and 2017, the top 0.1 percent of tax filers saw a 56.8 percent increase in income, while the bottom 50 percent only saw an increase of 3.2 percent (Edmonton Community Foundation, 2021). This inequality has been produced and exacerbated by deregulation (in favour of industry), privatization, the lowering of taxes, and cuts to government programs (Harrison, 2015). Although such practices are indicative of neoliberal governance and are evident in many countries around the world, the notable shrinking of redistributive policies and programs in Canada has arguably been accelerated by the country's rise as a global exporter of oil (Shrivastava, 2018). Indeed, income inequality has increased at a faster pace in Canada than in many other countries in the last several decades (Shrivastava, 2018). This has obvious and direct consequences for urban centres in Alberta, including Edmonton, which reside at the epicentre of this oil production.

As the main site of petroleum extraction, the scaling back of redistributive programs and policies in Alberta has been acute (Fraser et al., 2015). Among a range of consequences, the prominence of oil has led to the diminished influence of unions alongside significant encroachments on workers' wages, benefits, and rights (Barnetson, 2015; Shrivastava & Stefanick, 2015). Although these concessions have dire outcomes for all residents, they have particularly damaging outcomes for women and racialized people who are overrepresented in low-paying jobs, underemployment, and unemployment (Fraser et al., 2015; Russek, Thornton, & Elias, 2021).

This inequality is also inextricably connected to the neoconservative ideology of the province, which holds the heteropatriarchal family structure as the ideal and reinforces heteropatriarchal norms, laws, and political institutions (Fraser et al., 2015). As such, most high-paying positions are filled by white men, and the responsibility of unpaid and low-paid labour falls predominantly on women, many of whom are racialized (Dorow, 2015). Women's participation in the labour force is further undermined by a lack of political prioritization for adequate childcare, parental leave, and infrastructure essential for employment, such as public transportation (Lahey, 2015).

Economic instability

Although these inequalities are pervasive when oil prices are high and there is an abundance of available wealth in the province, they are especially pronounced during periods of recession. Alberta's reliance on oil as a single commodity leaves the province's municipalities vulnerable to volatile external markets and creates a cyclical boom and bust economy (Emery & Kneebone, 2013). The effects of this economic instability on people living with precarity and the consequences for the human services sector in Edmonton are notable. Economic "booms" lead to population increases, housing shortages, high rents, and stress on existing infrastructure while economic "busts" are marked by funding shortfalls at the exact time that demand for services increases (Edmonton Chamber of Voluntary Organizations, 2016).

This instability and its effects can be seen with each and every recession. After decades of expanding the oil industry to maximize profits, a global recession in the 1980s caused oil prices to crash with significant damage to Alberta's economy. This led to substantial unemployment across the province, housing foreclosures, and widespread food insecurity (Harrison, 2015). Although Alberta's economy eventually recovered, it remained vulnerable to—and, some would argue, became even more reliant on—unpredictable external markets due to a combination of escalated extraction and the increasing costs of oil production. As such, Alberta experienced recessions in 2008 and 2014, with similarly devastating effects

(Shrivastava & Stefanick, 2015). Alberta, and Edmonton, had not yet recovered from this latest downturn in oil prices when the COVID-19 pandemic led to a social and economic lockdown in March 2020.

The COVID-19 pandemic

Although it can be argued that the inadequacies of societal systems were abundantly apparent before COVID-19, supported by willful ignorance rather than a lack of visibility, the pandemic has undisputedly changed and exposed the economic and social landscape of our societies in unprecedented ways (Findlay, Saulnier, & Stratford, 2020). Specifically, the COVID-19 pandemic has added distinct pressure on the economy, with Canada reaching a record-high unemployment rate of 13.7 percent in May 2020 (Statistics Canada, 2020d). From February to April 2020, 3 million Canadians experienced job disruptions, and another 2.5 million worked less than half of their typical hours (Statistics Canada, 2020c). Further, the dual shocks of the pandemic and volatility in the oil and gas sector has signalled a prolonged economic downturn in Alberta, where reliance on a single commodity has led to decreased resilience. In January 2021, Alberta's unemployment rate ranked as the second highest in Canada, with Edmonton's unemployment rate among the highest of major Canadian cities (Statistics Canada, 2021). In March and April 2020, employment in low-wage jobs dropped by 38 percent across Canada, compared with just 13 percent for all other jobs (Statistics Canada, 2020d). From February to April 2020, over half of all workers in the lowest wage bracket (earning less than \$16 per hour) lost most or all of their work; this was the case for just one percent of workers in the highest-wage decile (earning \$48/hr or more; Stanford, 2020).

The pandemic's effects on employment have, unsurprisingly, been both gendered and racialized (Statistics Canada, 2020c; van Barneveld, Quinlan, Kriesler, Junor, Baum, Chowdhury, Junankar, Clibborn, Flanagan, Wright, Friel, Halvie, & Rainnie, 2020). For example, women have experienced greater job losses and slower employment gains than men due to a disproportionate loss of jobs in feminized sectors (e.g., retail, hospitality, food services), the overrepresentation of women in low-paid and part-time work, and women's roles in unpaid care work (Goertzen, 2020; Statistics Canada, 2020b). From August to December 2020, unemployment rates among Indigenous (13%), Black (13%), and other racialized Canadians (11.5%) was far higher than for white Canadians (7.4%), in part due to the prevalence of racialized workers in the hard-hit service sector (Block, 2021).

These significant job losses as a result of COVID-19 have caused many in Edmonton to experience material deprivation in ways they may not have previously, with an increase in the number of people experiencing precarity and conditions of poverty. In response to the dire circumstances being faced by many individuals and families in the city, local organizations and municipal government agencies have come together to try to find collective solutions to the crises arising from the pandemic. For example, a food insecurity table was created by the municipal government shortly after the pandemic began to orient nonprofits to the work of emergency food provision and to more effectively facilitate the collective distribution of resources. An existing partnership between the municipal government and local immigrant and newcomer-serving nonprofit organizations also redirected its efforts to better understand the issues that arose after the first lockdown and create cross-system working groups to respond to the challenges, such as a lack of access to technology. The COVID-19 pandemic created a context in which collaborations and ways of working to address poverty and precarity that had not been previously desirable suddenly became both urgent and possible. As poverty elimination provides the underlying motivation for the partnership described here, the following section offers a brief overview of poverty in Edmonton.

Poverty in Edmonton

Poverty is generally considered to be the condition of being deprived of the "resources, means, choices and power necessary to acquire and maintain a basic level of living standards and to facilitate integration and participation in society" (Canada, 2018, p. 8). Despite this broad definition, poverty is generally measured according to available income, since this is the easiest way to broadly estimate how many people experience conditions of poverty (although this process is

not without its complications, as the multiple methods of measuring poverty in Canada attest). In 2018, the Canadian government announced its first poverty reduction strategy, Opportunity for All, and adopted the Market Basket Measure (MBM) as Canada's official measure of poverty, based on the cost of a suite of goods and services representing a basic standard of living (Statistics Canada, 2016). Other Canadian municipalities, including Edmonton have followed the federal government's lead and adopted the MBM. Using this measure, Edmonton's poverty rate in 2018 (the latest year for which data is available) was 7.5 percent (Statistics Canada, 2018). In terms of composition, women and children comprise a large majority, with close to 8,500 female-led, lone-parent households living with lower incomes in Edmonton and nearly one in five children experiencing poverty prior to the pandemic (Edmonton Social Planning Council, 2019a).

Employment is obviously a significant determinant in whether somebody experiences poverty. Employment in and of itself, however, is not enough to mitigate conditions of poverty. This is primarily because employment in Canada does not guarantee a living wage. Prior to COVID-19, 50–70 percent of Canadians living in poverty were employed, often holding multiple jobs (Jackson, 2018; Lefroncois, 2015). Alberta has one of the highest rates of working poverty in Canada (Edmonton Social Planning Council, 2017). In Edmonton, the living wage for a dual-income family of four in 2019 (the most recent year for which living wage was calculated) was \$16.51 per hour (Edmonton Social Planning Council, 2019b). With the minimum wage currently at \$15 per hour for adults and \$13 per hour for those under the age of 18, many individuals living in Edmonton do not earn a wage sufficient to cover costs for themselves and their families. Further, even with living wage legislation in place, there is no guarantee workers will receive it. For example, over a 12-month period (between July 2017–2018), an average of 117,300 people employed in the Edmonton area earned less than the stipulated \$16.51 per hour wage (Edmonton Social Planning Council, 2020a). Low-wage employment is also connected to the broader issue of precarious work, which is a pervasive problem. Precarious jobs are characterized by instability and insecurity, and they have several common features, including low pay, part-time hours or irregular and unpredictable schedules, and few benefits or job protections (Lewchuk, Lafleche, Dyson, Goldring, Meisner, Procyk, Rosen, Shields, Viducis, & Vrankulj, 2013). In the Edmonton region specifically, over three-quarters of jobs are in the services sector, which tend to be low-paying, precarious jobs (Edmonton Social Planning Council, 2017).

Having a sufficient and reliable income has obvious impacts for accessing nutritious food, safe and affordable housing, and other necessities. Prior to the pandemic, 13.8 percent of Edmonton residents were food insecure with a lack of access to quality food due to financial, physical, or social barriers (Edmonton Social Planning Council, 2020b). As many as one in five families in Edmonton were spending more than 30 percent of their income on housing prior to the pandemic (Edmonton Social Planning Council, 2019a). Many of these families also spent the equivalent or more on childcare costs (EndPovertyEdmonton, 2019), a necessary expense to maintain employment opportunities. Although no figures are yet available, work conducted through the partnership shows that the number of individuals and families experiencing hardship has increased substantially since the start of the pandemic. Within this context and with a mandate to address poverty in Edmonton, the partnership set out to explore strategies that could support an inclusive economy in Edmonton through a poverty reduction lens.

TOWARD AN INCLUSIVE ECONOMY APPROACH

This section outlines the inclusive economy concept before describing the specific strategies the community-university partnership is exploring in an attempt to address poverty in Edmonton through economic recovery efforts in response to COVID-19. Unfortunately, there is currently only minimal literature available that speaks to the concept or the attempted creation of inclusive economies (Lee, 2019). As such, this research draws on a wider range of literature that describes a variety of relational economic models (e.g., the social solidarity economy, the care economy) that seem to generally align with and support the underlying principles of an inclusive economy.

Inclusive economies

In light of the failings of dominant economic models, particularly following the economic crisis of 2008 and more recently COVID-19, newer relational economic models have begun to come to the fore in the Global North. As an alternative to individualistic, rational free-market economies (Chang, 2014), relational models intend to provide a more holistic framework for understanding the economy and provide a pathway toward achieving equitable outcomes.

Relational models and equitable outcomes

Relational economic models purport the value of mutuality and social connectedness; they acknowledge the interdependence that exists between the economy, society, and the environment (Raworth, 2017; van Osch, 2013). Although there are a number of terms to describe such approaches, *inclusive economies* is used here to articulate a relational economic approach that challenges the causes of income inequality to raise the standard of living for all individuals. As such, the focus of these models is on social rather than economic profit. With an emphasis on redistributive justice and deep sustainability, inclusive economy approaches prioritize social objectives and consider the collective value of producers, workers, consumers, and citizens (Utting, 2015). Further, they acknowledge and value the role of unpaid labour as essential to a thriving economy, which is of particular and growing importance in an aging society and one in which childcare is becoming less and less affordable (van Osch, 2013).

The concept of an inclusive economy provides an alternative framework for understanding the economy, with the goal of creating widespread economic prosperity for all members of a community. Specifically, an inclusive economy approach directly challenges the causes of poverty and income inequality to raise the standard of living for all individuals (Lee, 2019; Utting, 2015), whereby opportunities exist for all people to participate in the economy, there is an equitable distribution of the benefits and harms of economic activity, and there are opportunities for all people to participate in decision-making about the systems that affect them (Munro, 2002).

The need for contextualized evidence

Although some would consider an inclusive economy approach to be on the “radical” fringes of economic thought, the concept has attracted increasing attention in the mainstream since the 2008 global financial crisis (Utting, 2015). Despite this increased interest, there is relatively little evidence documenting attempts to develop and implement policies and practices that support an inclusive economy approach (Lee, 2019). As the inclusive economy concept originated in the late 2000s among the economic development community in the Global South (supplanting the concept of “pro-poor growth”), what little evidence that does exist about how economic policies can promote equity is largely specific to developing countries (Lee, 2019). Among developed countries, where an inclusive economy approach has only recently become popular among policymakers and (to a far lesser degree) researchers, the evidence base is even weaker. Most research in developed countries has focused on conceptual issues of defining and distinguishing terms associated with this approach (e.g., inclusive growth, growth plus, inclusive economy), as well as describing examples of innovative inclusive economy initiatives, generally in the absence of any accompanying research or evaluation evidence to suggest “what works” (Lupton, Hughes, Macdougall, Goldwyn-Simpkins, & Hjelmso, 2019). Without research investigating the outcomes of these policies for different groups, the inclusive economy rhetoric is at risk of being co-opted (intentionally or otherwise) to justify policies that may actually perpetuate the inequities this approach intends to mitigate (Lee, 2019). Indeed, an important criticism levelled at this concept is that “inclusive economy” has become a buzzword and used as window dressing to justify long-standing policies that uphold the status quo and do not lead to any meaningful, transformative change to existing systems (Lee, 2019).

Further, an inclusive economy approach is influenced by the unique economic, political, and institutional contexts of a particular community (Lupton et al., 2019) and is, therefore, place based. While trends such as rising inequality, the in-

crease of precarious work, and labour market disruptions due to technology and energy transitions are consistent across other developed countries such as the United Kingdom and the United States (where most of the research about inclusive economies in developed countries originates), inclusive economy strategies must also be situated within the specific realities of a given community. There is a clear need not only for research in this area but for community-based research that builds a knowledge base that both informs and is informed by “on the ground” change efforts. With one of the highest income disparities in Canada, Edmonton provides both a necessary and interesting site of study within an Alberta petro-culture context. As such, this partnership set out to explore possibilities for creating an inclusive economy in Edmonton to mitigate poverty.

Inclusive economy efforts

Environmental scan

Recognizing increasing attempts to create alternative economic models and strategies, whether or not they used the specific term inclusive economy, a member of the partnership conducted an environmental scan to get a sense of what existed locally and further afield that could inform local efforts. The scan involved a review of literature and informal interviews with a variety of stakeholders working in community-based organizations, industry, educational institutions, governments, and regional economic development organizations. The intention of the environmental scan was to learn about emerging and best practices in Edmonton and further afield, and gauge interest for collaborating locally. This resulted in a report (Hanewich, 2019) that outlined possible ideas for creating an inclusive economy relating to two core concepts: inclusive growth and workforce development. It also highlighted how essential it is to enable cross-sector collaboration in the pursuit of an inclusive economy, particularly between educational institutions, industry, government, and community organizations.

Ideally, educational institutions would provide education and training to create pathways into employment, working with employers to align training with industry needs, and creating policies to reduce financial barriers to education. Industry would play a role in supporting good working conditions (e.g., consistent schedules, living wages) for lower paying jobs, creating pathways from low- to higher-paying positions, and considering equity in hiring and training in sectors poised for growth. Governments would create targeted policies and programs (e.g., social procurement), directing regional priorities, and ensuring physical and social infrastructure exists to enable people to access economic opportunities (e.g., transportation, affordable housing, childcare, community services). Community organizations would provide workforce development supports, tailor training to workforce trends, and develop partnerships with employers who provide good jobs. And individuals who are economically marginalized, many of whom experience poverty, would be centred in economic discussions to develop new strategies that allow everyone to contribute to and benefit from the economy.

To collectively work toward an inclusive economy, training and education providers and community/nonprofit organizations need to coordinate their efforts with industry to ensure workforce development strategies are aligned with employment opportunities and reduce barriers to acquiring gainful work. Employers and industry must understand the role they play in creating good working conditions, supporting workers with stable schedules, living wages, and other factors that contribute to decent work. At an overarching level, regional economic development organizations must lead the way in setting transparent economic development strategies that are targeted to those living in poverty, supported by governments that foster an inclusive growth ecosystem through incentives and supports for all stakeholders. With this foundational knowledge and with an appreciation for the emergent nature of the work, the partnership has chosen to engage in extensive cross-sector and community collaboration over the next several years. In particular, it has recognized how important it will be to bring industry, community-based organizations, educational institutions, municipal government, and people with lived experience together to align and contextualize the work. As such, a considerable amount of time is spent convening a variety of people situated across the city to determine where possible opportunities might lie.

Research and evaluation

A number of research methods have been incorporated to document the process of creating an inclusive economy. One researcher is solely dedicated to working alongside EndPovertyEdmonton and using fieldwork methods, such as participant observation and interviews, to answer the overarching question: to what extent can an inclusive economy be built locally as a way to mitigate conditions of poverty? The researcher participates in all partner meetings to understand the work that is taking place and attends cross-sector meetings to observe how people are working together, how decisions are made, and what barriers and facilitators exist to the creation of an inclusive economy. The researcher also supports the EndPovertyEdmonton in-house evaluator to assess progress using a developmental evaluation approach. Developmental evaluation can assist individuals or collectives to develop social change initiatives in complex or uncertain environments by guiding adaptation to emergent and dynamic realities (Patton, 2016). As with most poverty-related initiatives, measuring progress is exceptionally difficult because of the complexity involved and generally requires a patchwork approach of methods rather than a discrete and linear design (Cabaj, Leviten-Reid, Vocisano, & Rawlins, 2016). Rather than specific indicators or predetermined outcomes, it can be helpful to have principles to help measure progress. Although this design is emergent, a broad question that is helping to guide both the work and the evaluation is: who receives the benefits of this initiative and who bears the costs? (Munro, 2020). Zeroing in on the distribution of effects resulting from the strategies implemented in the creation of an inclusive economy makes it possible to ensure that the benefits and potential harms are equally distributed, with particular attention to age, gender, class, disability, race, and other intersecting identities. By documenting and assessing the work in this area, the research team can help to track the extent to which equity is a central factor in efforts to create an inclusive economy and mitigate conditions of poverty.

Strategic areas

EndPovertyEdmonton has chosen to focus on four key content areas within an inclusive economy framework that, if achieved, would collectively ensure a sufficient level of income for all residents, whether or not they are employed.

1. *Employment and training:* Equip people with the skills needed to enter the labour market and earn liveable incomes
2. *Social procurement and community benefits agreements:* Create jobs in partnership with industry, governments, and community organizations and develop new markets for social enterprises, co-operatives, and minority owned businesses.
3. *A living wage:* Ensure people are provided good jobs that involve, among a range of things, a living wage.
4. *Basic income:* Create policies that enable a reasonable standard of living for all residents in Edmonton, regardless of their ability to work in paid employment. The work related to employment and training is heavily tied to social procurement and community benefit agreements because the creation of employment opportunities is futile without a sufficient number of individuals to apply for them. As such, both are discussed collectively below.

In relation to employment, training, and social procurement, EndPovertyEdmonton has several activities currently taking place. One of these involves convening a social procurement coalition monthly to explore ways to work with governments and other institutions to develop and implement sustainable procurement policies. The coalition comprises representatives from municipal government, city council, industry, trade union groups, and nonprofit organizations that support economic development. As a result of this work, social procurement policies are in the process of being developed through collaborations with the Alberta government, local universities, and Alberta Health Services, the biggest anchor institution in the province. As part of the City of Edmonton social procurement policy, EndPovertyEdmonton will work with the city to monitor the outcomes of social procurement projects and their impacts on the community. EndPovertyEdmonton has

also developed a process for working with developers bidding on infrastructure projects, such as transit development, guiding them to include equitable policies and practices with regards to hiring, training, and living wages.

Furthermore, EndPovertyEdmonton convenes a workforce development collaboration that involves professionals from a range of poverty and newcomer-focused nonprofit organizations, agencies that support employment and training, municipal government, and employers. The collaboration meets monthly to discuss potential employment and training opportunities for people who experience disproportionate unemployment and underemployment. Through the group, alignments are made between employers and agencies who support individuals in seeking employment and training, and efforts are made to remove and reduce barriers that may impede employment.

In addition to ensuring living wages through social procurement and community benefit agreements, EndPovertyEdmonton has also held and captured conversations with a wide number of business owners and employers to understand their practices and motivations for a living wage in order to increase understanding about how to incentivize the provision of adequate wages. These conversations also intended to see if there would be interest in creating an advisory committee to more deeply engage business owners and industry stakeholders in the process of creating an inclusive economy. One of the themes that has come from this work is the recognition that paying a living wage leads to better employee retention. These conversations also showed, however, a level of conservatism from many business owners and industry stakeholders and a desire to return to the pre-pandemic status quo, with a limited understanding that poverty and precarity are areas requiring attention in Edmonton and, more broadly, Alberta. As such, the motivation to create a business advisory committee to inform the creation of an inclusive economy has been fairly low and, unless it is carefully constructed, would have conflicting priorities that could ultimately undermine efforts to address poverty. As such, the creation of this advisory committee has been put on hold and EndPovertyEdmonton will continue to connect with individuals in business and industry to try and find a group of potential partners motivated to support inclusive economic outcomes. These conversations will also be used as a stepping stone to further examine the concept of *good work*; what it means to people and what can be done to improve workplace policies and practices. Further, EndPovertyEdmonton works closely with the Alberta Living Wage Council to inform living wage strategies across the province, including the development of a living wage employer accreditation process.

Finally, efforts to secure a basic income have mostly centred around advocacy. Advocating for basic income was not an area that initially received much attention because although the benefits to poverty reduction were clear, the introduction of such a policy felt politically elusive. Quite quickly after the COVID-19 pandemic began, however, a policy window seemed to open up in response to dramatic increases in food insecurity and the rapid implementation and distribution of government subsidies in Canada. At this time, there were a substantial number of calls for a basic income, including from EndPovertyEdmonton, which mobilized and sought the support of city councillors, politicians, business associations, labour groups, and others in the province. Work was also done to understand public perceptions of basic income in an attempt to raise consciousness about the benefits of a basic income policy. Since September 2020, the momentum around basic income seems to have slowed, but EndPovertyEdmonton continues to participate in provincial and federal advocacy discussions and is prepared to respond quickly if and when a new policy window opens up.

DISCUSSION

As this collective effort is only in the initial stages, it is too early to determine the successes and challenges of attempting to create an inclusive economy. Some initial areas of learning, however, are important to highlight for further discussion. The first relates to the extent to which a municipality is in a position to create its own inclusive economy. The second regards the balance between idealism and pragmatism, and the question of whether something is better than nothing at all.

Cities as sites of transformation

Cities are increasingly taking the lead in addressing a wide range of social, economic, cultural, and environmental problems. As inclusive economy strategies are place based and influenced by the unique economic, political, and institutional contexts of a particular community, municipalities might be best positioned to support the creation of inclusive economies. Inclusive economy strategies are inherently complex; they require the coordination of stakeholders who often hold divergent goals, priorities, and motivations. Municipal governments are uniquely situated to coordinate policy agendas across multiple orders and stakeholders (Lee, 2019), although this is far from easy to accomplish in practice.

Local governments also have the potential to directly support the implementation of inclusive economy strategies through spending on programs and services (e.g., skills training) and providing incentives to other stakeholders to implement similar strategies (e.g., providing business incentives to hire individuals with barriers to employment; Hanewich, 2019). As the level of government closest to citizens, municipal governments should have the greatest understanding of the realities of poverty in their communities and the strongest connections with local stakeholders while also playing a major role in influencing provincial and federal levels of government (Association of Municipalities of Ontario & Ontario Municipal Social Services Association, 2009; Federation of Canadian Municipalities, 2017). Focusing on the city level makes it possible to tailor strategies to the needs, opportunities, and resources of a specific context. Similarly, data generated at a local level has the potential to build a more informed understanding of how the benefits and harms of economic strategies are being distributed among groups—as well as the unanticipated consequences of well-intentioned strategies—making it possible to ensure policies are truly inclusive and equitable (Lee, 2019; Munro, 2020). Because of the proximity between EndPovertyEdmonton and the City of Edmonton and the ways they work in close partnership, the municipality is kept up to date about poverty in the city and made aware of points of potential intervention. This has led to some policy changes and the development of programs such as subsidized public transit and a living wage policy for all municipal staff and contracted services. EndPovertyEdmonton's close, long-standing relationships with stakeholders across different sectors in Edmonton enables it to more easily convene groups at a local level and produce tangible outcomes that may be difficult at a provincial or federal level.

Despite all of us these advantages, the extent to which an inclusive economy can feasibly be built at the municipal level, without provincial and federal alignment and support, remains an unanswered but pertinent question. Some have raised doubts about the extent to which municipalities can shape inclusive economies at all given their limited powers and resources (Lee, 2019). Although there are certainly provincial differences in the ways municipalities are considered and treated, there is a general consensus that municipalities possess only a weak level of decision-making power legally and practically (Hallstrom, 2018). This can be seen clearly in the case of basic income, which requires policy changes at the federal level. With only a distal influence, this has limited efforts in this area. Subsequently, the partnership has primarily focused on advocacy and networking with other basic income groups across the province.

Beyond a lack of influence in policymaking, others have documented the ways municipalities have been too lenient in areas in which they do have the power to shape the urban economy and poverty reduction efforts. For example, a number of authors have criticized the role of municipalities in negotiating with business owners during the creation of community benefits agreements in development projects, citing a lack of accountability (e.g., Nugent, 2017; Parks & Warren, 2009). Beyond a missed opportunity for achieving inclusive economic aims, such as the creation of employment opportunities with living wages, weak community benefits agreements run the risk of appearing progressive while, in reality, contributing to the gentrification of marginalized neighbourhoods (Gross, 2008; Nugent, 2017). In Edmonton, this was clearly seen in the development of a new ice hockey arena that was completed in 2016. During negotiations, the developer repeatedly threatened to take the franchise to a different city and the municipality repeatedly conceded to their demands (Scherer, Mills, & Sloan McCulloch, 2019). As a result, the social benefits that could have been gained in the development of a

new stadium and surrounding area were entirely missed and many social harms accrued. Further, the conservative cost to the public has been estimated at \$1.5 billion; funds that could have been allocated elsewhere (Scherer et al., 2019).

The matter of what is possible in the creation of an inclusive economy at the municipal level is also particularly relevant for people living in Alberta, where the provincial government swung from the left-of-centre New Democratic Party to the far-right United Conservative Party (UCP) led by Jason Kenney. Since the UCP's election in April 2019, the provincial government has quickly moved to eradicate existing policies and introduce sweeping cuts, alongside familiar neoliberal promises to "balance the budget" and "cut red tape." Among a range of political moves, the UCP government has made significant investments in the oil industry, attempted to expand coal mining in the Rocky Mountains, introduced a \$30-million-per-year energy information "war room," and made catastrophic cuts to institutions and services, particularly post-secondary education (Adkin, 2020; Markusoff, 2021). In such a political climate, the need for municipal agency and power to support an inclusive economy is clear. As long as municipalities remain "creatures of provinces" within Canada's constitutional system, however, they will struggle to exercise such autonomy (Keil, 2002). Creating an inclusive economy in Edmonton will therefore be especially difficult while such a strained political climate exists in Alberta.

Pragmatic ideals

A second dilemma in this work relates to balancing the desire for an inclusive economy with what is pragmatically possible. For society to move toward an inclusive economy—one that redistributes wealth more equitably, centres individuals who are economically marginalized in economic discussions and decision-making, and reconsiders value beyond capital accumulation—it will require a considerable and widespread desire for deep structural change. It will require sweeping policy adjustments and legislation that values and protects those who work and those who may never earn a full income through employment. It will also require a serious reassessment of our attachment to (settler colonial) neoliberal ideology and everything that derives from and intersects with it.

With this in mind, it is often difficult to know where to begin. Although more and more people are beginning to discuss the need for relational, redistributive economic models in opposition to the current state (e.g., Raworth, 2017; Utting, 2015; van Osch, 2013), these conversations tend to reside at the conceptual level. As such, there is limited practical guidance for how to build these economies in a comprehensive way to make significant and meaningful structural change. This limited guidance has been difficult for a partnership aiming to developing a strategy that can force actual structural change in the fight against poverty and not just add further window dressing to justify austerity measures (Lee, 2019). There is always the risk that initiatives introduced to change the current state actually serve to reinforce it (Nugent, 2017). As Audre Lorde (1984) reminded us, "the master's tools will never dismantle the master's house. They may allow us temporarily to beat him at his own game, but they will never enable us to bring about genuine change" (p. 112). Edmonton has indeed been criticized previously for taking a harm reduction approach (e.g., by improving services) rather than addressing the structural roots of poverty, such as the inequitable distribution of income and wealth (Raphael, 2020). In a city and province where oil is the primary economic driver and where white male conservatism prevails, it is extremely difficult to know whether, how, and when to push for more radical, structural change and when to leverage the opportunities that might be more feasible but might not achieve equitable structural outcomes (Nugent, 2017). In the area of social procurement, for example, the employment opportunities have tended to be in the construction industry and will, therefore, primarily benefit white men who were previously employed in the oil industry. These opportunities serve those who are more likely to make their way back into employment and do not support the larger majority of racialized women who have lost work in the service sector as a result of the economic downturn. There is a long way to go before we can build strategies that lead to actual wealth redistribution, and the introduction of regulation similar to the living wage policy will be essential in these redistribution efforts (Raphael, 2020).

In doing this work well, it is also vital to more effectively centre individuals who are economically marginalized in the creation of strategies and policies that affect them. The partnership has experienced challenges in developing the structures for this engagement and has worked primarily with government, postsecondary, nonprofit, trade union, and industry representatives rather than citizens. The process of creating a decision-making panel of people who experience conditions of poverty to inform the work was started, but the panel's involvement had to be postponed when the pandemic began due to barriers of internet access, time, and disrupted life circumstances. Although the plan is to reconvene this advisory panel, it will take some time to re-establish. Until then, the partnership will continue to work closely with nonprofit professionals who act as representatives for the individuals and families they work with and can contextualize and inform decisions made at the coalition tables. Although this is obviously no substitute for the involvement of individuals and families, it is reflective of the sector at present; that is, a broad desire to move toward more full and inclusive modes of engagement without yet being fully realized.

This leaves the question of whether something is better than nothing in working toward an inclusive economy. This question has plagued the nonprofit sector and the partnership's own work in the neoliberal era, when the cycle of providing siloed emergency services is increasingly common (Spade, 2015). This has both undermined the ability to collectively advocate for structural change and inadvertently relieved governments of their responsibility to provide protective legislation and sufficient social security (Evans, 2015; Riches, 2002). In attempts to build an inclusive economy, this might be the equivalent of creating (good) employment opportunities through social procurement and community benefit agreements without seeing accompanying changes to public regulation that would alter the structure of employment across Alberta and Canada. Advocacy efforts, alongside more practical and immediate measures, are needed to move toward an alternative and inclusive economic state.

CONCLUSION

This article sought to outline initial efforts to build a new, inclusive economic approach in a city in Western Canada through a community-university partnership. Although this work is particularly challenging given Alberta's historical and political context, current instability, particularly in light of the COVID-19 pandemic, makes the need for systemic changes ever more urgent. And while spaces for democratic debate continue to be squeezed and governments increasingly introduce policies without public consultation, new arenas for resistance, contestation, and change are being created (Keil, 2002; Miller, 2007; Shrivastava, 2015). Such resistance has been seen recently in response to the destructive measures introduced by the UCP government, such as the attempted expansion of coal extraction. Widespread public pressure resulted in a government reversal on a number of actions, including the reinstatement of policy to protect certain areas from open-pit mining (Markusoff, 202). Such examples of collective resistance indicate there is the potential to create economic policies, practices, and discourses in Alberta that are more inclusive.

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French Nonprofit Organizations Facing COVID-19 and Lockdown: Maintaining a Sociopolitical Role in Spite of the Crisis of Resource Dependency

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ABSTRACT

COVID-19 became a global health crisis affecting all collective spheres. French nonprofit organizations (NPOs) are trying to participate in the crisis response, but they are suffering from the consequences of the crisis and a structural lack of resources. The aim of this article is to understand how they reacted to the crisis and how they coped with the associated lack. It is based on an extensive survey of French NPOs during the first lockdown. The results show that NPOs considerably reduced their activity while trying to maintain social links. Despite the reorganization of working arrangements during COVID-19, the economic impact of the crisis was very strong.

RÉSUMÉ

La crise sanitaire du Covid-19 devient une crise globale qui touche toutes les sphères collectives. Les associations françaises tentent de participer à la réponse à la crise mais, en dépit de cet engagement, elles subissent de plein fouet les conséquences de la crise et souffrent du manque de ressources qui est déjà structurel chez elles. L'objectif est de comprendre comment elles ont réagi à la crise en composant avec ce manque. L'article s'appuie sur une enquête de grande ampleur auprès des associations durant le premier confinement. Les résultats montrent que les associations ont considérablement réduit leur activité, tout en essayant de maintenir des liens sociaux si possible. L'impact économique est cependant très fort, malgré la réorganisation des modalités de travail.

Keywords / Mots clés: France; Nonprofit organizations; COVID-19 crisis; Resource dependency theory; Stakeholders / Associations; Crise; COVID-19; Théorie de dépendance aux ressources; Parties prenantes

INTRODUCTION

Whatever the sector, the activity, or the nature of an organization, the COVID-19 health crisis upset its employees, volunteers, and beneficiaries. Nonprofit organizations (NPOs) were both victims of the crisis and key players working to reduce

its impact on society. They had to have two strategies at the same time. They had to do everything they could to ensure their survival, which was under threat (Kim & Mason, 2020), and they also had to try to maintain their activity as much as possible to preserve a privileged social space for members, volunteers, and beneficiaries. NPOs all share the same objective: to have an impact on society (Kelly & Lewis, 2009). When society is disrupted by a crisis, NPOs tend to be the first organizations to react, and the positive impact they seek to produce in normal times then becomes particularly crucial.

However, a crisis such as COVID-19 impacts the environment and available resources. Before the crisis, NPOs were already facing resource acquisition problems. The literature has shown that this lack of means not only affects the success of NPOs (Greiling, Harris, & Stanley, 2016) but also their ability to react to crises and maintain their activity (Loomis, 2020). Beyond organizational success, meeting stakeholder requirements is particularly hindered by a lack of resources. In times of crisis or not, this is one of the main challenges for the nonprofit sector (Mitchell & Berlan, 2016).

In line with Cathy Barr (2020), the objective of this article is to analyze the resource needs of NPOs and to underline their willingness to maintain their social impact in times of health crisis. The study focuses on the most numerous French NPOs, “associations.” They are grassroots volunteer organizations (GVOs), insofar as their governance and day-to-day operations rely primarily on members and volunteers.

This article first focuses on the particularities of French GVOs and the literature on crises. Then it turns to survey questions posed to GVO leaders based on the resource dependency theory. The results are discussed according to the concept of organizational capacity.

FRENCH GVOS, THE CRISIS, AND RESOURCE DEPENDENCY THEORY

French GVOs as a segment of civil society and the social and solidarity economy

In France, the Hamon Law of 2014 (Ministère de l'économie, des finances et de la relance, 2014) established a legislative framework defining the social and solidarity economy around three principles. First, these organizations are NPOs: they have “another pursued goal than the sole sharing of profits” (République Française, 2014). Second, their governance is democratic and integrates the stakeholders. Third, the distribution of profits is controlled and dedicated above all to the organization, and the distribution of obligatory reserves is prohibited.

The European vision of a social and solidarity economy is more precise (Stokkink & Perard, 2015) and specifies that the distribution of benefits is possible if it is equitable. Democratic governance insists on equal voting rights. Finally, two characteristics are crucial: the importance of “social or collective utility” (p. 3) and the plurality of resources, coming from the market as much as from public authorities.

In addition to belonging to this sector, French GVOs have a social role because they sometimes take the place of the state (Evers & Laville, 2004). Social policy reform (Cabedo, Fuertes-Fuertes, Maset-LLaudes, & Tirado-Beltrán, 2018) has contributed to this movement. In sports, culture, and the medico-social sector, GVOs are essential, with or without allocated budgets (Dubost & Zoukhoua, 2011). Their local importance is well established, particularly because they are involved in community development (Laville, 2002; Misener, Morrison, Shier, & Babiak, 2020; Tschirhart & Gazley, 2014). GVOs are providers of quasi-public goods and services (O'Dwyer & Unerman, 2008). Their political and civic role is also crucial (Hamidi, 2010) because they have the power to influence, defend, and advocate for their members and some of their stakeholders. They often participate in standards formulation and policy evaluation (Poził & Hacker, 2017).

French GVOs before the crisis

French GVOs represent a large part of the nonprofit private sector. Their total budget is 113€ billion, they employ 1.76

million people, and nearly one out of two citizens has been involved with them (Tchernonog & Prouteau, 2019). The sector continues to grow, and competition exists between GVOs. Their number is indeed rising year by year, while at the same time the number of donors and funders is shrinking (Sargeant, 2001). France currently has about 1.5 million GVOs (Tchernonog & Prouteau, 2019), but volunteering is not growing as fast as the GVOs sector needs.

The lack of means is one of the major problems of French GVOs. Traditional resource providers have changed their support and now offer more and more in-kind contributions or use “calls for projects” to select the organizations to be financed rather than traditional operating grants (Tchernonog, 2007). Volunteers have also changed their behaviour and are increasingly turning to less formal commitments (Plaisance, 2017). Finally, employees are a very scarce resource, since only 12 percent of French GVOs are employers. Due to this low professionalism of GVOs, the most important resource is time. Thus, management processes are sometimes considered a waste of time.

The literature (e.g., Cabedo et al., 2018; Rey García, Álvarez González, & Bello Acebrón, 2013) acknowledges that the lack of resources explains the weakness of certain management processes, such as accountability or evaluation. However, these processes are precisely the ones that ensure the engagement of stakeholders who contribute resources. Thus, NPOs in general and GVOs in particular are often blamed for their management shortcomings (Chokkalingam & Ramachandran, 2015). Governance is poorly developed (e.g., Behn, DeVries, & Lin, 2010), transparency is often insufficient (e.g., Burger & Owens, 2010), and the efforts made are rarely sustained over time (Baapogmah, Mayer, Chien, & Afolabi, 2015).

GVOs in the face of crises

A crisis can be defined as “a low-probability, high-impact event that threatens the viability of the organization and is characterized by ambiguity of cause, effect, and means of resolution, as well as by a belief that decisions must be made swiftly” (Pearson & Clair, 1998, p. 3). It usually leads to organizational crises, which

occur fairly often, such as when NPOs are exposed to irregular situations such as reduced budgets, increased competition from nonprofit and for-profit organizations, and reduced institutional support, and this necessitates performance under financial constraints. (Mano, 2010, p. 345)

The COVID-19 crisis is affecting NPOs across borders. It upsets the organization, its management, and its governance (McMullin & Raggo, 2020) and has particularly negative effects on its financial health (Kim & Mason, 2020). The effects of a crisis on NPOs are threefold. First, crises affect the NPOs’ ability to maintain their day-to-day activities, particularly for their members and/or beneficiaries. Second, crises prevent NPOs from fulfilling their sociopolitical role among communities. Finally, crises destabilize the financial and economic health of NPOs, which is already fragile. In short, the survival of NPOs is in question because their viability is defined on the basis of the three preceding items (Dadić & Ribarić, 2020; Omura & Forster, 2014; Weerawardena, McDonald, & Mort, 2010).

As noted, NPOs were already facing resource management issues before the COVID-19 crisis. An exogenous crisis then complicates the access to these resources. The COVID-19 crisis prevented French GVOs from mobilizing their volunteers when mobility restrictions were in place. The anticipation of an economic and financial crisis, linked to indebtedness and the forced shutdown of the economy, also led GVOs to question the permanence of their partnerships, financial or not. Under these circumstances, the crisis forced GVOs to adapt and break organizational routines (Mano & Rosenberg, 2014). They had to react and make decisions to stop the vicious circle, especially in terms of resources access.

Resource dependency theory in times of crisis

Resource dependency theory is concerned with the positioning of an organization in its environment. This environment

provides the necessary resources for the survival of the organization, but they are scarce (Pfeffer & Salancik, 1978). The organization becomes dependent on this environment, in other words, on the stakeholders who provide the key resources. This theory also notes that the environment is not always favourable to the organization: stakeholders may have bad intentions, interests may diverge, and, of course, global crises may occur.

The strategy of an organization is, therefore, to react to the situation of resource dependency. This dependency is inevitable, but it must be managed and reduced. More generally, the environment is qualified by this theory as uncertain, complex, and unpredictable. Reducing resource dependency makes it possible to reduce the uncertainty and unpredictability of the environment.

In short, resource dependency theory integrates the risk of crises and recognizes that the survival of an organization depends on the resources at its disposal. It is, therefore, applicable to GVOs and the COVID-19 crisis. The aim of this research is to determine the extent to which resource dependency aggravated the consequences of the crisis on French GVOs. In sum, the research questions (RQs) could be phrased as:

RQ1: To what extent has the COVID-19 crisis affected the resources of French GVOs?

RQ2: How have the resources available before the crisis protected these organizations?

Hypothesis development

The concept of organizational capacity can be seen as a relevant analytical filter to answer to these research questions. It is defined as the “ability to fulfill one’s mission and meet stakeholders’ expectations, which depends on the resources available” (Mourão, Pereira, & Moreira, 2017, p. 846). The concept and the theory share several characteristics. They note the uncertainty and complexity of the environment and emphasize the scarcity of resources and the need to act according to these particularities. They also underline that the organizational goal is to respond to the demands of the environment, represented in particular by a network of stakeholders that must be satisfied. Organizational capacity guides the organizational strategy, which consists of arbitrating between resources to achieve the mission, according to the resource dependency theory.

Organizational capacity produces outputs and outcomes, in particular toward stakeholders and society in general. Both resource dependency theory and the concept of organizational capacity emphasize the importance of environmental satisfaction. According to Burton Weisbrod (1988), NPOs came to supplement the state when it had reached the limit of its action to compensate for the shortcomings of the market economy. On the specific case of “associations,” according to Cyrille Ferraton (2004), who analyzed Alexis de Tocqueville’s concept of “association,” GVOs allow the poorest to attain a form of ownership through organized and institutional charity. The common good and the “higher interest” for the collective exist thanks to the sacrifices of a few who provide assistance and solidarity to others. In sum, Hypothesis 1 is: despite the resource crisis faced by organizations, the essence of GVOs around public goods and solidity would push them to maintain their sociopolitical role.

Organizational capacity is influenced by the environment, which is more or less favourable, as well as by the provided resources. Resource dependency theory also emphasizes that the organizational environment is paramount to understanding how GVOs work. Thus, Hypothesis 2 is: the sector to which GVOs belong is a determinant of their reaction to the crisis in the short term, regarding their activity and their cash flow.

Organizational capacity allows for a better understanding of the organization’s resources, which are mostly intangible (Sobeck & Agius, 2007). Its structure is made according to the types of resources but is quite variable in the literature

(Hall, 2004; Hall, Andrukow, Barr, Brock, de Wit, & Embuldeniya, 2003). The three main dimensions of the concept are financial, human, and structural capacities. Michael H. Hall, Alison Andrukow, Cathy Barr, Kathy Brock, Margaret de Wit, and Don Embuldeniya (2003) provide a definition for each of these dimensions: financial capacity is “the ability to develop and deploy financial capital (i.e., the revenues, expenses, assets, and liabilities of the organization)” (p. 5); human resources capacity is “the ability to deploy human capital (i.e., paid staff and volunteers) within the organization, and the competencies, knowledge, attitudes, motivation, and behaviors of these people” (p. 5); and structural capacity is “the ability to deploy the non-financial capital that remains when the people from an organization have gone home” (p. 5). In this framework, the human capital is a determinant of the others. Thus Hypothesis 3 is: financial and human resources capacities help GVOs to cope with the crisis in the short term, regarding their activity and their cash flow.

METHODS

To answer the research questions, several analyses need to be conducted:

1. An analysis of the activity maintenance, which reflects the evolution of the tangible resources available to the French GVOs (i.e., material, human, or financial resources).
2. An analysis of the persistence of the sociopolitical role of French GVOs, which reflects the evolution of the intangible resources available to these organizations.
3. An analysis of the financial and economic health of French GVOs, which directly addresses the availability of financial resources.
4. If possible (when the variables will not be binary), an analysis of the effects of the crisis on the previous issues through the filter of the environment (represented by the sector) and of the financial and human resources before the crisis.

In France, during the first wave of the COVID-19 epidemic, the authorities instated a very harsh lockdown. This decision led to the closure of most public places and private ones, too. Companies, public services, NPOs, and GVOs had to accept an unprecedented rule: face-to-face work became the exception. Exits from the home were subject to attestations for very restrictive and specific reasons. Only essential goods and services were available.

The survey used for this study was constructed and carried out by the main players in the sector. The first is *Le Mouvement associatif*, the main federation of GVOs, whose mission oscillates between representation and advocacy. The second is the *Réseau National des Maisons des Associations* (National Network of Associations Centres), which supports GVOs in their development. The third is *Recherches & Solidarités*, a network of experts, professionals, and academics who study GVOs. The survey was conducted in collaboration with a department of the Ministry of National Education and Youth dedicated to GVOs.

Once the questionnaire had been constructed, it was distributed electronically among all the above-mentioned networks with the support of the public authorities. The survey was published on March 20, 2020, just after the announcement of the lockdown.

The present sample includes the 20,419 GVOs leaders' responses, which were received until April 24, 2020. For methodological reasons, this study should be considered as a work on a database. The questions were imposed and the variables are only qualitative. The details of the questions as well as the proposed answers can be found in Table 1.

Table 1: Questionnaire sent to NPOs and descriptive statistics of associated variables

Questions and proposed answers	Modality name	N	Mean	Median	SD
Conjuncture and economic impact (contextual data)					
Today, what is the impact of the current coronavirus crisis on the daily and ordinary activity of your NPO? (1: yes and 0: no)	Impact on the activity	20,333	0.8945	1	0.3073
Have you been forced to cancel or postpone one or more events? (1: yes and 0: no)	Cancelled/delayed events	20,139	0.9274	1	0.2595
If the NPO has employees, what solutions have you considered for some or all of them? (multiple choices – for each answer, 1: yes and 0: no)					
<i>Recourse to compensated work stoppage for childcare (14 days)</i>	Work stoppage for childcare	20,419	0.1405	0	0.3475
<i>Use of short-time working</i>	Partial unemployment	20,419	0.4319	0	0.4953
<i>Recourse to the FNE-formation (National Employment Fund)</i>	FNE-formation	20,419	0.0046	0	0.0677
<i>Use of telework</i>	Teleworking	20,419	0.3296	0	0.4701
<i>Face-to-face work with respect to preventive measures</i>	Face-to-face work	20,419	0.0838	0	0.2772
Regardless of the size of your NPO and its sector of activity, what economic impact do you foresee at about six months? (multiple choices – for each answer, 1: yes and 0: no)					
<i>A significant loss of income from activities</i>	Significant loss of revenue	20,419	0.3753	0	0.4842
<i>A total loss of income from activities, taking into account the NPO's mode of intervention and official instructions</i>	Total loss of income	20,419	0.1552	0	0.3621
<i>A loss of grant(s) related to the cancellation of an activity or event</i>	Loss of subsidies	20,419	0.2909	0	0.4542
<i>A drop in public financial aid</i>	Decrease in public aid	20,419	0.2544	0	0.4355
<i>A drop in private financial aid</i>	Decrease in private aid	20,419	0.2144	0	0.4104
<i>Expenditures incurred that are no longer required because activities have been cancelled</i>	Unnecessary expenses	20,419	0.1843	0	0.3878
<i>A cash-flow difficulty linked to a postponement of activities and financing</i>	Difficulty of cash flow	20,419	0.3188	0	0.4660
<i>It's too early to answer that question</i>	It's too early to say.	20,419	0.3138	0	0.4640
Have you experienced cash flow difficulties in 2019? (1: yes and 0: no)	Cash difficulties in 2019	19,338	0.2252	0	0.4177

Plaisance (2021)

Table 1 (continued)

Questions and proposed answers	Modality name	N	Mean	Median	SD
Social roles (in order to test Hypothesis 1)					
Have you maintained links and relationships with the volunteers in your NPO? (multiple choices – for each answer, 1: yes and 0: no)					
<i>Yes, in a spirit of solidarity (long-distance exchanges, mutual aid, etc.)</i>	Links maintained for solidarity	20,419	0.5987	1	0.4902
<i>Yes, by pursuing activities at a distance when they allow it (project development, preventive measures, communication, operation...)</i>	Links maintained for activity	20,419	0.5041	1	0.5000
<i>Yes, through exchanges of information on the current life of the NPO</i>	Links maintained by info	20,419	0.3568	0	0.4791
<i>Yes, some of them can continue to operate in the field</i>	Links maintained in the field	20,419	0.0473	0	0.2122
<i>No, relations with volunteers are suspended due to lockdown measures</i>	No link maintained	20,419	0.1656	0	0.3718
Have you mobilized or do you plan to mobilize volunteers from your NPO to maintain links with your members and/or beneficiaries during this very special period? (multiple choices – for each answer, 1: yes and 0: no)					
<i>Keep in touch</i>	Keep in touch	19,618	0.7291	1	0.4444
<i>Relay official messages</i>	Relay official messages	19,184	0.7278	1	0.4451
<i>Provide some services (shopping, childcare...)</i>	Providing services	17,762	0.1496	0	0.3567
<i>Guide them through administrative procedures</i>	Guide to administrative procedures	17,796	0.2384	0	0.4261
<i>Propose remote animations/activities (quizzes, network games, exchanges on a subject...)</i>	Remote activities	18,470	0.3816	0	0.4858
In the current context of lockdown and in a progressive way, do you think that your NPO and its volunteers could mobilize in a civic approach, beyond its members and/or beneficiaries? (multiple choices – for each answer, 1: yes and 0: no)					
<i>Yes, if the health authorities tell us how to do it</i>	Ready to mobilize/health authorities	20,419	0.2447	0	0.4299
<i>Yes, subject to good protection of the volunteers themselves</i>	Ready to mobilize/protection of volunteers	20,419	0.3684	0	0.4824
<i>No, because they are particularly mobilized for members and/or beneficiaries</i>	Already mobilized	20,419	0.1424	0	0.3495
<i>No, because that's not the role of the NPO</i>	No mobilization	20,419	0.3976	0	0.4894

Table 1 (continued)

Questions and proposed answers	Modality name	N	Mean	Median	SD
Dependent variables (in order to test Hypothesis 2 and Hypothesis 3)					
To go further, what proportion of this activity are you able to maintain for the moment? (one choice)	5 - Maintaining <20%	19,901	4.4371	5	1.1198
	4 - Maintaining 20-40%				
	3 - Maintaining 40-60%				
	2 - Maintaining 60-80%				
	1 - Maintaining >80%				
How many months of operations are covered by your cash flow, starting today? (one choice)	3 - Cash for more than 6 months	16,042	1.8923	2	0.9431
	2 - Cash for 3-6 months				
	1 - Cash for less than 3 months				
	0 - No cash flow				

Note: For binary variables, the average is also the percentage of people who answered “yes” and the median is also the mode. For the two ordinal variables, the percentage of respondents that gave each answer are presented in Tables 2 and 3, and the mode will be the major percentage.

The questions posed to the GVOs covered many dimensions. Two of them have been retained to provide an overall context: the direct effect of the crisis and administrative measures on the daily functioning of the organization and the economic impact of the situation. The evolution of the GVOs' social role is also studied in order to test Hypothesis 1.

In addition to these univariate analyses, bivariate analyses are proposed regarding the maintenance of operations and available cash because they are the only two ordinal variables. They are both studied according to the GVO's activity sector, its financial resources (as in its annual incomes), and the number of employees, in order to test the Hypothesis 2 and Hypothesis 3. Eleven sectors were provided:

1. Charity (e.g., charitable and humanitarian action in favour of all people in difficulty)
2. Social action (e.g., medico-social institutions, home assistance, support for the elderly)

3. Health (e.g., health centers, blood donation, prevention)
4. Advocacy (e.g., fight against discrimination, religious activities, animal protection)
5. Leisure (e.g., socio-cultural activities, social tourism, youth movements)
6. Education (e.g., training and insertion in the labour market)
7. Sports (e.g., clubs or not)
8. Culture (e.g., artistic organizations)
9. Economy (e.g., groups of professionals, consumer protection, economic development)
10. Local (e.g., organizations that support local communities)
11. Environment (e.g., the protection of the quality of life and the environment)

RESULTS

The activity is considerably affected and relies on a new organization of the employees' work

Ninety percent of French GVOs suffered the consequences of the crisis and the lockdown. No sector was unaffected, and only a handful of organizations managed to be resilient. Seventy-five percent of the GVOs were able to maintain less than 20 percent of their activity. Ninety-three percent of organizations had to cancel their events during the lockdown. This result can be analyzed in two ways. On the one hand, GVOs in the charitable sector were the most resilient and cancelled fewer events than other sectors. On the other hand, the maintenance of seven percent of events is surprising in view of the extreme lockdown measures. Some of the events were remote and helped to reinforce the digitalization of GVOs.

GVOs with employees had to adapt their working conditions. The choice of a partial unemployment scheme was retained by the majority, as the state had set up a lump-sum allowance system. Public authorities took charge of up to 84 percent of the net wage. The rest of the wage remained the responsibility of the organization. Telework was retained by 33 percent of the organizations. Another system was used for employees with children: 14 percent of the organizations were able to utilize the childcare vacation compensated by the state. Finally, some organizations were able to partially maintain face-to-face work. The GVOs in the social action (32% of them) and charity (17% of them) sectors were above all able to maintain links with their beneficiaries.

Social interactions are maintained if possible

Beyond their work with beneficiaries, GVOs play a special role with their members and volunteers. The maintenance of solidarity links with volunteers during social distancing was the priority of 60 percent of the GVOs. Fifty percent of the organizations maintained these links to ensure the continuation of activities. Thirty-six percent only maintained information and accountability. Meanwhile, 17 percent of the organizations lost contact with their volunteers.

Maintaining links with the volunteers impacts the activities and mission of an organization. The vast majority of GVOs asked their volunteers to focus on their members and beneficiaries to keep in touch and to relay health information from the authorities.

Solidarity actions were also set up, but only in a minority of GVOs. Daily services such as shopping or childcare were offered by one GVO in seven. Assistance with administrative procedures was more widespread: one GVO out of four. Finally, 38 percent of the GVOs animated their community remotely. While the volunteers were confined, 15 percent of the GVOs were nevertheless able to mobilize them to help their members and beneficiaries.

Finally, the external social role of French GVOs is crucial for these organizations. Thus, 37 percent of GVOs were ready to engage their volunteers with citizens and public services if they were well protected. Twenty-five percent of the GVOs were waiting for instructions from the health authorities. Only 40 percent believed that strict lockdown should be respected.

A strong economic impact on GVOs

First of all, the GVOs in the sample are mainly financed through public funds and the financial participation of beneficiaries and/or members in the organization. Only 26 percent of them receive individual donations; 25 percent receive private funding, notably through sponsorship. The source of the organizations' income is indeed a determining factor in understanding their capacity to react to the crisis (e.g., see Lasby, 2021, for the Canadian case).

The crisis has had multiple economic effects. During the crisis in March 2020, GVOs were anticipating serious difficulties. Thirty-eight percent expected a significant loss of revenue. Consequently, 32 percent of the GVOs were concerned about the difficulties of free cash flow. The cancellation of activities or events also played a role in the loss of deferred financing

(for 29% of the GVOs). The loss of public and private aid was also a serious risk. Advanced charges for cancelled activities weighed on budgets too. Finally, 16 percent feared a total loss of income.

The cash position of the French GVOs was considerably affected, since eight percent of them did not have any to begin with. Twenty-seven percent would not have enough to finance their operations beyond three months. Thirty-three percent were in an average situation while 32 percent had more than six months of cash.

An analysis based on resources and sector

Before presenting the results of the bivariate studies, it should be noted that 23 percent of French GVOs were already experiencing cash-flow difficulties before the crisis. The bivariate analyses carried out provide an understanding of the importance of the sector and of human and financial resources on the GVOs' viability, studied from the perspective of maintaining activity and having the cash flow available to cope with the activity reduction. The relevance of the results was verified using the chi-square test (χ^2) and the coefficient of association between the variables was measured using Pearson's phi. These two indicators are included at the bottom of each results table.

The sectors that have been able to maintain their activity at the highest level are the GVOs related to health, social services, and local solidarity (see Table 2a). Conversely, the most affected sectors are those that cannot be dematerialized, such as sports, some cultural activities, and leisure. Regardless of the sector, having few or no employees has limited the ability of GVOs to maintain their activity (see Table 2b). Eighty-four percent of GVOs with only volunteers were operating at less than 20 percent of their usual activity. As the number of employees increased, the easier it was for an organization to maintain activity. However, half of the structures employing more than 50 people almost stopped their activities. The argument is the same for the available budget (see Table 2c). Three out of four organizations with incomes of less than 100,000€ per year lost more than 80 percent of their activity. Even a budget of more than 500,000€ was only partially protective, since one out of two of those organizations saw more than 80 percent of its activities interrupted.

Table 2a: Analysis of activity maintenance according to the sector

	Charity	Social action	Health	Advocacy	Leisure	Education	Sport	Culture	Economy	Local	Environment	All
>80%	10%	7%	10%	7%	4%	6%	3%	4%	15%	10%	9%	5%
60–80%	10%	9%	8%	11%	3%	9%	1%	4%	4%	9%	10%	4%
40–60%	16%	16%	12%	14%	5%	12%	2%	7%	15%	15%	12%	7%
20–40%	17%	15%	17%	17%	8%	16%	3%	9%	22%	18%	15%	9%
<20%	47%	53%	52%	51%	81%	58%	91%	76%	45%	48%	54%	75%
N	779	1,501	350	298	2,933	1,128	7,305	3,144	115	699	668	

Note: $\chi^2 = 115.6^{***}$ ($p < 0.001$); Pearson's phi = 0.32

Plaisance (2021)

Table 2b: Analysis of activity maintenance according to the number of employees

	0	1 or 2	3 to 5	6 to 9	10 to 19	20 to 49	>50	All
>80%	5%	4%	6%	5%	6%	7%	9%	5%
60–80%	2%	4%	5%	7%	8%	7%	11%	4%
40–60%	4%	7%	10%	11%	11%	11%	17%	7%
20–40%	5%	9%	11%	12%	13%	14%	14%	9%
<20%	84%	77%	68%	64%	62%	60%	49%	75%
N	7,743	4,923	2,589	1,486	1,463	953	572	

Note: $\chi^2 = 38.1^*$ ($p < 0.05$); Pearson's phi = 0.23

Table 2c: Analysis of activity maintenance according to the annual incomes

	<10k€	10–50k€	50–100k€	100–200k€	200–500k€	>500k€	All
>80%	5%	4%	4%	5%	6%	8%	5%
60–80%	2%	3%	4%	5%	7%	10%	4%
40–60%	4%	4%	6%	10%	12%	14%	7%
20–40%	5%	7%	10%	11%	13%	15%	9%
<20%	85%	82%	76%	69%	63%	53%	75%
N	5,102	5,020	2,580	2,227	2,056	2,360	

Note: $\chi^2 = 38.8^{**}$ ($p < 0.01$); Pearson's phi = 0.25

The financial difficulties encountered by GVOs vary by sector (see Tables 3a, 3b, and 3c). The sectors that mobilize the most in times of a health crisis faced the greatest challenges. However, intra-sectoral diversities should be noted. Even though 12 percent of the health GVOs had no cash, 43 percent of them had more than six months of cash. The same diversity can be found in terms of employees. GVOs with liquidity problems were more numerous among those without employees. But 50 percent of them also had more than six months of cash. As the number of employees increased, the liquidity risks decreased but so did the six-month cash reserves (due, in particular, to the salaries to be paid). Finally, the annual incomes also show that the smallest GVOs are those with the least cash-flow problems (especially because the “no cash flow” modality is around five to ten percent of the organizations).

Plaisance (2021)

Table 3a: Analysis of cash flow according to the sector

	Charity	Social action	Health	Advocacy	Leisure	Education	Sport	Culture	Economy	Local	Environment	All
No cash flow	10%	10%	12%	9%	7%	9%	6%	8%	8%	7%	9%	8%
< 3 months	22%	37%	18%	27%	29%	37%	21%	27%	30%	31%	38%	27%
3 - 6 months	33%	34%	27%	24%	34%	34%	35%	33%	23%	36%	32%	33%
> 6 months	36%	19%	43%	40%	29%	20%	38%	32%	40%	26%	21%	32%
<i>N</i>	779	1,501	350	298	2,933	1,128	7,305	3,144	115	699	668	

Note: $\chi^2 = 49.6^*$ ($p < 0.05$); Pearson's phi = 0.21

Table 3b: Analysis of cash flow according to the number of employees

	0	1 or 2	3 to 5	6 to 9	10 to 19	20 to 49	>50	All
No cash flow	11%	6%	7%	5%	6%	6%	5%	8%
< 3 months	15%	27%	33%	35%	41%	45%	46%	27%
3 – 6 months	24%	37%	41%	42%	40%	40%	36%	33%
> 6 months	50%	29%	0%	18%	12%	9%	13%	32%
<i>N</i>	7,743	4,923	2,589	1,486	1,463	953	572	

Note: $\chi^2 = 86.1^{***}$ ($p < 0.001$); Pearson's phi = 0.35

Table 3c: Analysis of cash flow according to the annual incomes

	<10k€	10-50k€	50-100k€	100-200k€	200-500k€	>500k€	All
No cash flow	10%	7%	8%	7%	7%	5%	8%
< 3 months	13%	22%	28%	33%	40%	41%	27%
3 - 6 months	23%	32%	39%	39%	40%	40%	33%
> 6 months	54%	39%	25%	22%	13%	14%	32%
<i>N</i>	5,102	5,020	2,580	2,227	2,056	2,360	

Note: $\chi^2 = 73^{***}$ ($p < 0.001$); Pearson's phi = 0.35

DISCUSSION AND CONCLUSION

Hypotheses statement and their contextualization

The GVOs' socio-political role remains primordial. Despite all the difficulties encountered—problems of activity continuity, difficulty maintaining links with certain volunteers, and fears about the financial and economic viability—French GVOs have tried to maintain their social and political role. To this end, they made efforts to communicate, even remotely, with their volunteers, members, and beneficiaries. They have also offered services, sometimes unrelated to their activity. Finally, they have expressed their desire to support the public authorities, particularly through communication.

The obtained results (Table 1) illustrate that, by offering services to the community around them, French GVOs are indeed public goods providers and have proven to be reliable (Hansmann, 1986). Moreover, the French GVOs' volunteers have taken on health risks. They have made sacrifices to help other volunteers, members, or beneficiaries, as pointed out by Tocqueville. Finally, they have maintained a managerial dialogue through governance and accountability, but also more informal exchanges to ensure that the social link is not cut. Relaying health information was also one of their concerns. The GVOs' discourse on solidarity and well-being was not inconsequential. In short, Hypothesis 1 is supported.

The results can also be discussed according to the different mobilized resources. The concept of organizational capacity is a relevant filter, as previously explained, and is based on financial, human resources, and structural capacities. The next paragraphs focus on these three dimensions.

The financial capital of the GVOs was not spared by the crisis, but the most serious problems only concerned a minority of structures. The results point to a strong dependency of these GVOs on their funders. The partial or total loss of income linked to the cessation of activity and the loss of subsidies linked to a project illustrates the changeover already noticed by Viviane Tchernonog (2007): the financing of GVOs is based on their projects and not on their mission. Dependency on private funders also confirms the observation of Tchernonog and Lionel Prouteau (2019): the financing of GVOs is now mostly private. Table 2b confirms Rui Sun and Hugo Asencio's (2019) analysis of the positive role of organizational capacity, examined here from the perspective of financial capacity, in effectiveness. Finally, the results in Table 3a illustrate the theoretical framework proposed by Hall et al. (2003). The sector environment largely explains the available cash flow. However, while this same theoretical framework emphasizes the importance of human capital in understanding financial capacity, the results are more contrasted in terms of the relationship between the number of employees and cash flow (Table 3b).

Human resources capacity is the second dimension. The new working and commitment modalities as well as the mobilization of volunteers described in Table 1 underline the extent to which the French "associations" are indeed GVOs. Human capital is a condition for survival, and having employees protected the maintenance of an organization's activity, according to Table 2b. In short, Hypothesis 2 is supported and Hypothesis 3 has to be contrasted with financial capacity.

The concept of organizational capacity can thus be discussed by the results obtained. It captures all the available resources that an organization can mobilize in order to function, develop its projects, and achieve its objectives (Eisinger, 2002; Shumate, Cooper, Pilny, & Pena-y-lillo, 2017). In the case of GVOs, individuals create many synergies within the organization (Schuh & Leviton, 2006). However, the results contrast with the idea that the majority of resources are immaterial, since in French GVOs people are the most important. Moreover, the process described by the theoretical framework of Hall et al. (2003) is only partially found here, since human resource capacity has a complex effect on financial capacity.

Moreover, here, structural capacity has to be focused in particular on relationship and network capacity, understood as "the ability to draw on relationships with clients, members, funders, partners, government, the media, corporations, vol-

unteers, and the public” (Hall et al., 2003, p. 5). The importance of this relationship was seen above in terms of dependency on funders and on employees and volunteers. Beyond that, maintaining links between the organization and its volunteers and between its members and beneficiaries was at the heart of the GVO’s functioning during the crisis. This is the social and civic role of the GVOs, analyzed above.

Research questions statement and contributions

The research questions asked about the links between crisis and resources: how a crisis affects resources (RQ1) and the extent to which resources can protect against the impact of the crisis (RQ2). Regarding RQ1, the various results show that all the resources of French GVOs were damaged during the COVID-19 crisis, in particular because restrictions prevented volunteers from being present on site and prohibited most of the usual activities and events. In addition, financial stakes multiplied in the short and medium terms. This observation must be tempered, however, with the fact that the GVOs’ human capital enabled them to maintain their social and civic role. It is a first answer to RQ2. Whenever possible, GVOs tried to convert the social capital they usually create into a daily social and human connection. Finally, in order to fully answer RQ2 on one hand, pre-crisis resources protected GVOs from a sudden stoppage of activity. On the other hand, financial issues, particularly liquidity risk, were more complex.

This work calls on several contributions. First, it applies the resource dependency theory and the concept of organizational capacity to French GVOs. According to Deana Raffo, Leigh Anne Clark, and Murat Arik (2016), this approach has been little applied to NPOs. By extension, the use of this theory in the case of French GVOs is still rare. This theory proved to be relevant in this context: the lack of resources quickly turned out to be deleterious for GVOs. The concept of organizational capacity was a relevant filter for analyzing GVOs’ resources, and Hall et al.’s (2003) model was discussed. In addition, the results illustrated how theories dedicated to NPOs in general can be applied to French cases, as seen with the hypotheses development. Finally, the study covers a wide range of organizations, from all sectors and of all sizes (in terms of funding and employees).

Second, practitioner contributions primarily concern NPOs’ stakeholders. The resources they bring are crucial to their survival. In times of crisis, NPOs have played a fundamental social role for their communities. However, this role is intangible and almost impossible to measure. This is why the increase in requirements in terms of evaluation and financial performance is a real threat to NPOs and their sustainability. These expectations must be accompanied by the associated means, otherwise NPOs will end up in a vicious circle that forces them to finance new management activities in order to obtain funding. The authorities must remember the political and civic role of GVOs and continue to involve them in their policies. Democratically shared power will prevent the curse of the Medici, who had concentrated politics and economics in their hands (Zingales, 2017). In addition, the survey results and analysis provide a picture of the GVOs’ dependencies on their resource providers and test the resilience of the sector. It is a source of information for GVOs. Resources are a major issue that generally explain the management weaknesses of GVOs, as discussed above. Thus, the findings encourage stakeholders to ensure that their expectations can be met in a context of strained resources.

CONCLUSION

Based on a broad survey of French GVOs during the first lockdown in March 2020, four types of analyses were carried out, focusing on the maintenance of activity, the persistence of the social and civic role of the GVOs, the financial health of GVOs, and the importance of human and financial resources. This article completes the publication of the results by the involved actors (Le Mouvement associatif, RNMA, public authorities, and Recherches & Solidarités) by integrating it into a specific theoretical framework. This article is among the first to look at the consequences of the COVID-19 crisis on French NPOs.

There are some limitations to this study. It is based on a database; therefore, the questions and proposed answers are neither adjustable nor controlled. Most of the variables are either binary or ordinal. Complementary analyses based on metrics and interviews could be carried out in order to grasp the contours of the social and civic role of NPOs that are not perceived in the questionnaire.

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Surviving a Pandemic: The Adaptability and Sustainability of Nonprofit Organizations through COVID-19

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ABSTRACT

Like many other organizations in Canada and globally, nonprofit organizations have not been insulated from the negative effects of the COVID-19 pandemic. It has affected Canadian nonprofit organizations in numerous ways. This ranges from the effects of COVID-19 on the health of workers and clients to its effect on revenue. As predominantly essential service providers, nonprofit organizations have to find ways to continue operations during the COVID-19 pandemic to ensure that no one is left to fall through the cracks in an uncertain economy.

RÉSUMÉ

Comme bien d'autres organismes au Canada et dans le monde, les organismes sans but lucratif (OSBL) n'ont pas été épargnés par la pandémie du COVID-19. En effet, pour les OSBL canadiens, celle-ci a eu des incidences dans divers secteurs, allant de la santé des clients et employés jusqu'au revenu. Les OSBL, comme ils sont à toutes fins pratiques des fournisseurs de services essentiels, doivent trouver le moyen de continuer à fonctionner pendant la pandémie afin de s'assurer que personne ne soit oublié dans un contexte économique incertain.

Keywords / Mots clés: Nonprofit organizations; COVID-19 pandemic; Essential service providers; Adaptability / Organismes sans but lucratif; Pandémie du COVID-19; Fournisseurs de services essentiels; Adaptabilité

INTRODUCTION

The COVID-19 pandemic ushered in an economic crisis that is not unlike the 2007–2008 global financial crisis. Crises such as these lead to higher poverty levels for households and a downward spiral for the aggregate economy (Skoufias, 2003). As a part of the economy, nonprofit organizations are affected by these crises. The ongoing COVID-19 pandemic has impacted how nonprofit organizations are run due to its effects on stakeholders, employees, and clients.

This article explores the effects of COVID-19 on nonprofit organizations in Canada and current reactive modes of adapting to the pandemic. It reviews current reports on nonprofit organizations to reflect on how these organizations can adapt to the crisis and to the post COVID-19 economy.



COVID-19 AND NONPROFIT ORGANIZATIONS

Nonprofit organizations have been largely responsible for caring for Canada's most vulnerable populations. As with other organizations and sectors in the economy, they have been badly hit by the COVID-19 pandemic. Unlike a lot of the other organizations, however, they must power through the pandemic on the frontlines, providing essential services to people who have been affected by the pandemic.

Pre-COVID-19, nonprofit organizations accounted for 8.5 percent of Canada's GDP with an economic activity of \$169.2 billion and an employment level of about 2.4 million (Statistics Canada, 2019). Since COVID-19 measures hit the global scene in the first quarter of 2020, 69 percent of surveyed nonprofit organizations said they were experiencing a decrease in revenues (Lasby, 2020). Out of 1,089 charities surveyed in November and December 2020, eight percent had temporarily suspended operations, 77 percent had made short-term operating modifications, and 15 percent reported running their pre-COVID-19 operations (Lasby, 2021). Regardless of where these organizations were on the survival spectrum, they were fairly pessimistic about their future post-COVID-19 (Lasby, 2021). The reactive strategies of these nonprofit organizations make a difference in how they will survive this pandemic and thrive post-pandemic.

SHORT-TERM REACTIVE STRATEGIES

There are short-term reactive points that nonprofit organizations have adopted during the pandemic to ensure adaptability and survival. One of these strategies involved making a lot of their services and organizational systems virtual, including fundraising events, stakeholder meetings, volunteering, and administrative activities (Lachance, 2020). This is particularly important for fundraising activities because these organizations barely function at a financial margin. The declaration of a biological pandemic by the World Health Organization in March 2020, just before spring fundraising season, meant a financial hit for many of these organizations. A virtual alternative had to be adopted for them to stay afloat.

A closely related reactive strategy involves organizations tooting their own horns. With the lockdown restrictions, nonprofit organizations could fall into the out-of-sight-out-of-mind trap. As a result, they have to do more virtual advertising to maintain their existing donors and get new donors. This includes making their online presence more visible through web advertisements and easy web searches.

Nonprofit organizations in Canada have also kept afloat during this pandemic by applying for public and private COVID-19 related funds. Since the COVID-19 pandemic started, about a third of nonprofit organizations have experienced staff layoffs and reductions in their working hours. This is happening as demand for their services are increasing (Lasby, 2021). As a result, many nonprofit organizations in Canada have depended on temporary government programs such as the Canada Emergency Wage Subsidy, a government of Canada COVID-19 economic response plan that covers up to 75 percent of an employee's wages so eligible employers can avoid layoffs, rehire employees, and create new jobs.

These organizations have to adopt short-term strategies while creating a new and improved version of themselves that complies with COVID-19 regulations. As essential service providers, this involves protecting the on-site and virtual staff members and clients through the provision of masks, recommended vitamins, sanitizers, disinfectants, and virtual training on COVID-19 protocols for staff members and clients. While these short-term solutions may help nonprofit organizations survive the COVID-19 pandemic, there is a need for long-term solutions for post-pandemic survival.

LONG-TERM SURVIVAL STRATEGIES

Nonprofit organizations have limited funding, which makes building a business model difficult, especially a long-term business model. To ensure sustainability, these organizations have to put plans in place for the period after the pandemic.

The effects of COVID-19 have been extensive, including the physical effects of the illness, the financial effects of lost jobs and funding, and the psychological effects of isolation, and the post-COVID-19 world is uncertain for businesses and personal networks (Zahra, 2021). In order to be sustainable in the long run, nonprofit organizations will have to adapt to the new world system, be open to change, and manage their workforce.

Efficient workforce

In biology, strong immune systems help living organisms survive in positive and negative conditions (Ivanov, 2020). The immune system of an organization is its human resources. A long-term sustainability strategy requires nonprofit organizations to be attentive to the needs of the staff who are not immune to the effects of the pandemic, and who, as frontline workers, face higher risks of exposure. These organizations must look out for the welfare of their workforce.

Replacing workers is not costless. As a long-term survival strategy, organizations are better off caring for existing workers and adopting job-rotation among workers (Coşgel & Miceli, 1999). Through job rotation, employees perform different tasks, which promotes experience and variety. Educating workers in this way will enable them to meet the increase in demand during and after the pandemic. Job rotation is a better learning mechanism for workers than the monotony of specialization (Ortega, 2001). Since the needs of clients could range from biological to financial to psychological, workers have to be trained and armed with the right resources to meet changing demands in the uncertain new post-COVID-19 world.

Embrace technology

It remains to be seen if the shock created by COVID-19 is temporary or permanent. Technology has been used extensively during the COVID-19 pandemic (Bhusal, 2020). Canada's reaction to the pandemic has been more technology-centred, and a post-COVID-19 Canada is likely going to be technology based. As such, investments and a focus on information technology by nonprofit organizations in Canada will be beneficial for a post-pandemic world.

Embrace social media

A number of nonprofit organizations have had to spend their reserves and/or cut workers' pay just to stay afloat. Government subsidies have not been sufficient since the workload of the nonprofit sector has increased during this pandemic (Ontario Nonprofit Network, 2020). More avenues for crowdfunding, albeit virtual ones, have to be encouraged. Social media has been a useful tool for crowdfunding during periods of disaster (Gao, Barbier, & Goolsby, 2011), and as COVID-19 regulations have encouraged more virtual activities, more people have turned to social media for entertainment (Drouin, McDaniel, Pater, & Toscos, 2020). Nonprofit organizations can crowdsource on different social media platforms such as TikTok, Instagram, YouTube, and Facebook. Some of these sites are encouraged because nonprofits get paid directly by them for usage. For nonprofit organizations to be sustainable in the long run, they have to adapt to the new virtual world of social media and online crowdfunding by hiring a social media team or tapping into the social media skills of their existing workers.

Learn through it

Harvard professor and philosopher George Santayana famously said, "Those who do not learn history are doomed to repeat it." Nonprofit organizations in Canada need to document their experiences through COVID-19 and their survival strategies. They need to document and reflect on their adaptation to the new world system to ensure adaptability and preparedness during the next crisis and sustainability through the years.

CONCLUSION

The COVID-19 global pandemic has rocked Canada in multiple ways. Many nonprofit organizations have struggled to

adapt to the reduced capital and increased demand caused by the pandemic. The survival of these organizations depends on the strategies they put in place for their capital, including their human capital. Adaptability strategies that can help weather the storm of the pandemic can also prepare these organizations for periods of calm.

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Summing Up an Immeasurable Year

Sean Stevens-Fabry

Bread of Healing Clinics, Milwaukee, Wisconsin

ABSTRACT

COVID-19 has drastically impacted healthcare delivery across the United States and globally. This article outlines the strategic challenges of a free clinic in Milwaukee, Wisconsin, during the pandemic and describes various responses to these challenges. Communication with patients and staff, loss of volunteer practitioners and employee relations are specifically explored. The author argues that implicit aspects of the free-clinic business model positively impacted clinic resilience and suggests that lessons in workplace culture could be applied across sectors, with the aim of improved resilience during difficult times in the future.

RÉSUMÉ

Le COVID-19 a eu un effet considérable sur la disponibilité des soins de santé aux États-Unis et dans le monde. Cet article décrit les défis stratégiques confrontant une clinique gratuite à Milwaukee, Wisconsin, pendant la pandémie et recense diverses réponses à ces défis. L'article explore en particulier la communication avec les patients et le personnel, la perte de praticiens bénévoles et les relations avec les employés. L'auteur soutient que certains aspects implicites du modèle d'entreprise que représente la clinique gratuite ont eu un impact positif sur la résilience des cliniques en général et suggère que certaines leçons provenant de la culture d'entreprise de celles-ci pourraient s'appliquer à des secteurs différents dans le but d'améliorer leur propre résilience lors de futures périodes difficiles.

Keywords / Most clés : COVID-19; Pandemic; Non-profit; Free clinic; Workplace culture / COVID-19; Pandémie; Organisme sans but lucratif; Clinique gratuite; Culture d'entreprise

INTRODUCTION

As a result of the COVID-19 pandemic, Americans have died in numbers that would have, in the past, been unimaginable. A lack of access to care worsened the pandemic experience and highlighted its detrimental impacts for uninsured Americans (McCambridge, 2021; Yong, 2020). In Wisconsin, a free clinic on Milwaukee's north side faced significant challenges and implemented key changes resulting in positive outcomes for its clients and community. After trying to help mitigate chronic medical conditions for the past 20 years, the clinic's focus shifted to buffering pandemic impacts on a vulnerable community. There are valuable lessons learned from the free clinic model that offer useful information, not only for nonprofit organizations in strengthening their ability to meet their organizational mission but in more effectively facing similar challenges in the future. Some of the lessons should be applicable across economic sectors.



This article explores the free clinic model and its adaptive processes in the context of the pandemic. Using a case study model, the article describes the challenges and changes to organizational processes in detail, highlighting the importance of a strong organizational culture in generating positive results. Insights are captured through the perspective of the clinic manager, whose access provides insider knowledge of the free clinic as a nonprofit organization (Brannick & Coghlan, 2007).

THE PANDEMIC

In the United States, a large percentage of the population lacks access to primary care and basic medications as individuals struggle to navigate the layered healthcare system (McCambridge, 2021). Much has been written in the popular press about America's lack of preparedness and its population impacts during the pandemic (Yong, 2020). While countries such as Canada and the U.K. enjoy government-supported healthcare, the United States has traditionally avoided this model. Recent data from the Pew Research Center finds that 60 percent of the U.S. population would like government-funded healthcare (Bialik, 2017). Not only does there appear to be a lack of political will to overhaul American healthcare, misconceptions around the meaning of "Medicare for All" (Liu & Eibner, 2018) abound as Americans navigate a complex, piecemeal system, fraught with delays, prohibitive fees, and unmet care needs.

Throughout the COVID-19 pandemic, an American's healthcare experience may have shifted between private employer insurance, an *Affordable Care Act* product, or government-funded Medicare or Medicaid, and would have principally depended on age, immigration status, and work circumstances. If insurance was unaffordable or impractical, a "safety-net" clinic, such as the Bread of Healing Clinic in Milwaukee, Wisconsin, became the last option. A person's access to a free or sliding-fee clinic, which depends on geography and luck, determined their treatment options. This ambiguous system cares little about the state of one's health, and this type of hybrid system is particularly difficult to navigate, especially in times of stress or unexpected changes in personal financial circumstances.

NONPROFIT HEALTHCARE MODEL

The Bread of Healing Clinic has three sites in Milwaukee, Wisconsin. It was founded in 2000 by healthcare personnel who understood the implicit failure of the American healthcare system to serve everyone, particularly those whose social determinants of health added barriers to service navigation. The clinic founders understood these failures because they witnessed them regularly in practice. For the clinic founders, the model afforded an avenue for delivering medical care unconstrained by insurance barriers or impractical incentives. Despite resource limitations, it allowed these practitioners to serve patients as they felt called to do.

The Bread of Healing Clinics provide behavioral health, social work, medical, pharmacy, and dental services at no cost to patients. The clinic is funded through grants, partnerships, and private gifts. Relying heavily on grants, budgets are pre-funded at least a full year in advance, which was particularly important in the face of the COVID-19 pandemic. As an organization, a free clinic grows only as quickly as either its funders or qualified compassionate volunteers answer the call. Implicitly, it is a lean model.

ORGANIZATIONAL CHALLENGES AND CHANGE

As the full scale of the pandemic became apparent, there were multiple concerns for the clinic: communication with patients and staff, loss of volunteer practitioners, and employee relations. The clinic's varied responses to these challenges provide insight into the model's flexibility and resilience.

Communication with patients and staff

Pre-pandemic, the clinic served over 1,800 individuals. The volume of patients decreased about 25 percent during the

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first half of 2020, as people assumed the clinic had closed along with the rest of the world. However, it remained open every day. In the early months of the pandemic, there was no established way to communicate with a patient population whose priorities were undergoing a monumental shift. Given the lack of clear guidance from government as to how best to proceed and the climate of mounting community fear, it was difficult to remain measured and deliberate.

Telehealth was put into place and the clinic independently implemented medication delivery processes to keep at-risk patients off public transportation and to keep volunteers engaged in unique ways. The medication delivery system was expanded into vaccine deliveries for the home-bound, offering a way for the most vulnerable to access vaccines.

As COVID-19 advanced, a relatively simple series of adaptations were put in place to ensure effective communication, including the implementation of a clinic-wide group text chat with key staff and volunteers. It was utilized several times a day to resolve quick ambiguities and reduce triangulation of communication. Monthly staff meetings became weekly occurrences, with the aim of troubleshooting concerns as they arose. This practice allayed concerns about process or safety. Hybridized staff meetings, a combination of in-person and remote, allowed staff to engage, safely distanced if needed, and to plan or work through proposed operational solutions.

Loss of volunteer practitioners

During the pandemic, the clinic's medical providers—retired volunteer clinicians who make up most of the workforce—determined to stay home and stay safe. This could have been devastating to the clinic's capacity to provide patient care. It was crucial to find a way to utilize this essential group of healthcare professionals. The key component of keeping patients and staff distanced and safe was telemedicine. With the support of the Wisconsin Association of Free and Charitable Clinics (2021), the clinic received free access to a new suite of telehealth tools and took the simplest approach to broad implementation: connecting provider with patient via remote video chat. Staff chose their weekly schedules and were allowed to use the technology in whatever way they were most comfortable with, including allowing flexibility for the providers as to how the cases were documented and the medical orders were passed down.

It is important to note that this technology was new to many of the providers, who were used to paper charts. Electronic medical records are cost prohibitive for many free clinics, and technology can be a barrier for many older providers, who find it less efficient than a written note. Every provider could contribute in the way they were most comfortable. The clinic said “yes” to what both the providers and patients could give to the novel care experience and then built on it incrementally.

Employee relations

The clinic model functions with scarce funding. This forces clinic leadership to prioritize its mission, which places patients first. To realize this priority, the clinic created more flexible “time-off” policies, allowing employees to go negative on paid time off when necessary. Some long-standing assumptions on recruitment and retention were shifted to focus on employee retention in recognition of how essential staff are to the clinic's mission. Supporting staff through difficult times reflected the clinic's vision as a healthcare organization oriented around being mindful of the social determinants of health. The foundation of the organizational culture is, “To serve others, we must also take care of ourselves.” Work-life balance and the needs of family, beyond quarantine and isolation requirements, became discussion points as paid time off policies were revised. Rumors and assumptions that would have normally derailed clinic flow were used as opportunities for deep dialogue that acknowledged staff needs and inspired investments in individuals, rather than their dismissal. Staff that could work from home were encouraged to do so. No staff member or medical volunteer fell ill because of work-related risk. No employees left because of burnout. The clinic will likely come out of the pandemic with a contingent of volunteers who have stayed engaged in some form over the past two years and are ready to return. With committed effort and daily incremental adjustments, the clinic weathered the storm.

Stevens-Fabry (2021)

Lessons learned

Overcoming these challenges required a commitment to the clinic's mission, a faith in scientific principles, and an implicit understanding that achieving goals required a new strategy one action at a time through small, incremental adjustments in process. At the time of writing, 18 months into the pandemic and amid a spike in the delta variant of COVID-19, the clinic did not close its doors for one day and has achieved milestones that have eluded other nonprofit organizations: improved financial position, no staff illness due to work-related risk, and only two patient deaths from COVID-19 infections. The implications of lessons learned for other organizations are profound.

Because of the clinic's small size and lean model, it was possible to meet these challenges unencumbered by new financial concerns brought on by the pandemic. Pre-funded budgets assumed and enabled strategic planning a full fiscal year into the future. When an organization's operating budget is also its emergency fund, which is often the case in this sector, management becomes accustomed to financial scarcity. In the case of the clinic, the future was never certain. When the threat of COVID-19 loomed, quick action was taken: work-from-home policies, flexible time off, and new systems to improve communication were implemented. These tools linked those in office to those working from home.

The clinic was able to do these things because it is small and because it was built on a culture that accepts the challenge of finding novel ways to meet the needs of its patients. In larger organizations, bureaucratic resistance can stifle a "yes, and" approach to problem solving. It is necessary to constantly bring new ideas to bear to incrementally improve existing processes rather than rewriting the whole playbook. If funds are not secured ahead of time, a lean nonprofit cannot operate, nor can it function with high staff turnover. At the Bread of Healing Clinic, due to its size and efficiency, staff were funded, expenses went down, and assets actually grew amid the pandemic. Because the organization was not selling or billing for anything, and never has, operations were not dependent on sales or billing for services rendered. Because the clinic offers an utterly essential service, funders were ready to lend additional support. Even without an additional hand up from the government through the Payroll Protection Program (U.S. Small Business Administration, 2021), it would not have been necessary to sell equity or to take on debt in order to support the clinic, as a traditional for-profit business might need to do.

CONCLUSION

The downstream medical, economic, and behavioral health effects of the pandemic will be difficult to calculate for some time, if ever. The Bread of Healing Clinic, however, was able to meet its mission from a position that was uniquely and perhaps unintuitively secure. While some of the lessons learned may not be universally applicable, the nonprofit sector generally, and the free clinic model specifically, have a lot to teach for-profit systems, particularly in the healthcare space. It is imperative to be mindful of these lessons as we move forward in a world filled with greater uncertainty, particularly if we truly seek to offer equitable healthcare for everyone and believe it to be a basic human right.

When forced to make fast-paced adjustments with staff who are in a position of safe employment, an organization can more easily commit to doing mission-driven work. Bolstering the feeling of support for and among staff was key to weathering a challenge such as COVID-19. As we reimagine workplace culture, putting truths about people over assumptions about profit will fortify us in future challenges. The resilience of the nonprofit sector mirrors the resilience of the people that it seeks to serve, as well as the strength of those working in it.

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National Nonprofit Sector Advocacy During the COVID-19 Pandemic

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ABSTRACT

When the COVID-19 pandemic hit Canada in March 2020, charitable and nonprofit sector leaders quickly realized the survival of many organizations was at risk. Three national coalitions formed to seek support for the sector from the federal government. Their efforts produced several concrete policy outcomes, including the inclusion of charities and nonprofits in all major federal relief programs and two support programs designed for charities and nonprofits. They also contributed to significantly increased awareness among policymakers of the role and challenges of charities and nonprofits. This has opened a policy window that the sector can use to advance several long-standing goals.

RÉSUMÉ

Quand la pandémie du COVID-19 a frappé le Canada en mars 2020, les dirigeants du secteur caritatif et sans but lucratif se sont vite rendu compte que la survie de plusieurs organismes était menacée. On a donc formé trois coalitions nationales afin de chercher un appui au secteur auprès du gouvernement fédéral. Les efforts de ces coalitions ont mené à plusieurs politiques concrètes, y compris l'inclusion d'organismes de bienfaisance et sans but lucratif dans tous les programmes d'aide fédéraux majeurs et la création de deux programmes d'aide conçus spécifiquement pour les organismes de bienfaisance et sans but lucratif. Ces coalitions ont aussi contribué à accroître de manière significative la conscience parmi les stratèges du rôle et des défis des organismes de bienfaisance et sans but lucratif. Ces progrès ont créé des occasions politiques dont le secteur pourra profiter pour faire avancer plusieurs objectifs de longue date.

Keywords / Mots clés: Advocacy; Nonprofit; Charity; Public policy; COVID-19 / Défense des droits; Organisme sans but lucratif; Organisme de bienfaisance; Politiques publiques; COVID-19

INTRODUCTION

When the COVID-19 pandemic hit Canada in March 2020, charities and nonprofits across the country were faced with challenges few had ever anticipated. Almost overnight, staff moved out of offices and into living rooms, dining rooms, and kitchens. Events of all kinds, from local fundraising galas to regional festivals and national conferences, were cancelled. Thriving volunteer programs came to a screeching halt. Some organizations scrambled to move their programs and services online; others searched for personal protective equipment and renovated their space so they could continue



providing services in person; some had to shut down entirely. Amid this upheaval, sector leaders recognized immediately that the survival of many organizations was at risk. This led them to come together, at least for a time, to advocate for a small number of shared goals. Although their efforts were far from completely successful, they produced several concrete policy outcomes. They also contributed to significantly increased awareness among policymakers of the role and challenges of charities and nonprofits. This has opened a policy window (Howlett, 1998; Kingdon, 1984) the sector can use to advance several long-standing goals.

ADVOCACY EFFORTS

In the early days on the pandemic, three national coalitions emerged seeking support for the charitable and nonprofit sector. Imagine Canada, the national umbrella organization for charities and nonprofits, led one coalition; War Child Canada, an international aid agency, led the Emergency Coalition of Canadian Charities; and Cardus, a think tank with Christian roots, led the Canada Cares Coalition. The coalition led by Imagine Canada had more than 200 members and included many large national organizations and federations. It asked for an \$8 billion emergency stabilization fund, eligibility for charities and nonprofits in federal initiatives aimed at helping employers retain staff, flexibility in existing federal funding agreements, the suspension of rules that limit who charities can fund; and the creation of a government-sector table to share advice and ideas (Imagine Canada, 2020c). The Emergency Coalition of Canadian Charities had 140 to 160 members and included many of the same organizations as the Imagine Canada coalition. Three of its five asks were similar: a \$10 billion stabilization fund, access for charities to the same recovery programs available to businesses, and flexibility in funding agreements. Unlike the Imagine Canada group, the Emergency Coalition also asked for loan guarantees and a temporary increase in the Charitable Donation Tax Credit (War Child Canada, 2020). The membership of the Canada Cares Coalition differed significantly from the membership of the other two groups. A large proportion of its approximately 130 member organizations were small, locally focused organizations and many were religious organizations or organizations with religious roots. The Canada Cares Coalition focused exclusively on advocating for a one-to-one donation matching program.

The Emergency Coalition of Canadian Charities was the first of the three coalitions to issue a news release and it had significant success in getting mainstream media coverage of it (see Ferreira, 2020; Jackson, 2020; Keung, 2020; Northcott, 2020; Posadzki, 2020). This success was most likely due to the high-profile and media connections of the coalition's leader, War Child Canada President Samantha Nutt. The group also wrote an open letter to the prime minister and held meetings and phone calls with government officials. Its direct lobbying efforts did not meet with immediate success, however, and after not much more than a month of activity, War Child Canada withdrew from a leadership role in sector-wide advocacy.

The Canada Cares Coalition was somewhat slower off the mark than the Emergency Coalition, but it developed a more detailed policy proposal, used a wider variety of advocacy tactics, and kept up its efforts for much longer. In addition to issuing news releases and engaging in media-relations and government-relations activities, it established a website (Canada Cares, n.d.-a) and a social media presence. It also actively encouraged charities to join the campaign, share their support on their own social media channels, and write their Member of Parliament. Finally, it used research to support its policy proposal (Canada Cares, n.d.-c) and public opinion polling to support its advocacy efforts. Canada Cares advocated for a donation matching program for more than a year, ceasing activity only after the federal government's 2021 budget was delivered. The last statement from the group, issued April 19, 2021, expressed disappointment that the budget did not include a donation matching program (Canada Cares, n.d.-b).

The coalition led by Imagine Canada used the widest array of advocacy tactics and persisted for the longest period. Its initial news release (Imagine Canada, 2020a) was issued one day after that of the Emergency Coalition and did not attract

the same amount of attention from the media. The data analysis it provided to support its proposals (Imagine Canada, 2020b), however, helped it garner attention a few days later. A Canadian Press article was picked up by more than 180 print and broadcast media outlets across the country (see, for example, Press, 2020a, 2020b) and the data were cited in approximately 60 additional media stories. Roughly 60 radio and television stories followed over the next two weeks, many featuring interviews with Imagine Canada CEO Bruce MacDonald. Aside from its media campaign, the Imagine Canada coalition held meetings and phone calls with government officials and conducted multiple letter-writing and social media campaigns. It also made extensive use of survey results to support its advocacy efforts (Imagine Canada, 2021; Lasby, 2020, 2021; Lasby & Barr, 2021). Finally, Imagine Canada created a COVID-19 hub on its website, which it used to publicize its advocacy activities; share stories and research on the impact of the pandemic on the sector; and share information about ever-evolving federal support programs. At the time of writing, the hub was still being updated regularly.

POLICY OUTCOMES

Although the sector was not successful in obtaining its most high-profile asks—a stabilization fund and donation matching program—its efforts produced several concrete policy outcomes that helped thousands of organizations continue to operate, employ staff, and deliver services throughout the pandemic. These included two programs designed specifically for charities and nonprofits. The Emergency Community Support Fund, launched in the spring of 2020, provided \$350 million for charities and nonprofits that offer essential services to vulnerable populations (Prime Minister's Office, 2021a). The Community Services Recovery Fund, announced in the 2021 federal budget, will provide \$400 million to help charities and nonprofits adapt and modernize (Canada. Department of Finance, 2021). Millions of dollars in targeted support were also provided to food banks; seniors' organizations; women's shelters; sexual assault centres; mental health organizations; arts, culture, and sports organizations; and organizations led by and serving Black Canadians.

In terms of the amount of funding involved, the most significant victory was the inclusion of charities and nonprofits in all major federal COVID-19 relief programs, including the Temporary Wage Subsidy for Employers, Canada Emergency Wage Subsidy, Canada Emergency Commercial Rent Assistance, Canada Emergency Rent Subsidy, and Canada Emergency Business Account. The Canada Revenue Agency estimates that, to date, charities and nonprofits have received between \$3.7 and \$4.1 billion through the Canada Emergency Wage Subsidy alone (Canada Revenue Agency, personal communication, October 4, 2021). The inclusion of charities and nonprofits in programs developed to support employers was not a foregone conclusion. They were not included in programs developed to help businesses during the 2008–2009 financial crisis, and when the prime minister first laid out the government's response to the pandemic, they were not mentioned (Prime Minister's Office, 2020b). In fact, concerted efforts were required to ensure charities and nonprofits were eligible for these general support programs. It is worth noting, however, that they were included automatically in the more recently developed Sector Workforce Solutions Program and Canada Recovery Hiring Program. This suggests that an understanding that charities and nonprofit are employers as well as service providers may finally have penetrated the corridors of Ottawa.

Another important development occurred in January 2021, when the Minister of Families, Children and Social Development was given a mandate to “continue to work across government to ensure that charities and non-profits have the tools that they need to modernize as they emerge from the pandemic to support the Government's overall agenda in a manner that responds to the needs of Canadians in every region” (Prime Minister's Office, 2021, para. 16). In this way, the government signalled that the sector was officially on its agenda and assigned the Department of Employment and Social Development to be the *de facto* “home in government” for the sector—at least for now. The wording of the mandate letter also indicates a growing understanding in government circles of both the role of the charitable and nonprofit sector and its challenges.

The governing party was not alone in developing more awareness of the sector during the pandemic. In March 2021, the House of Commons debated an opposition motion calling on the government to include measures to support the charitable sector in the upcoming budget (Canada. Parliament, 2021). The motion, which was introduced by the Conservative Party, passed with support from all four opposition parties. The number and nature of interventions in the House since March 2020 also show growing awareness of, and interest in, the sector among elected representatives of all political stripes. Imagine Canada tracks interventions in the House that mention the sector. Prior to the pandemic, such mentions were exceedingly rare, amounting to no more than a handful a year. From the date the pandemic was declared to the end of June 2021, the House sat for 143 days; in that time, there were at least 150 separate interventions that mentioned the sector. Many of these involved Members of Parliament speaking about the contributions of charities and nonprofits in their communities, but others raised key policy issues such as program eligibility and the need for core funding.

The clearest indication of the government's changed perspective on the sector came in the recent federal budget. Budget 2021 has been called "significant and historic" (Syed, 2021, para. 1), "monumental" (Syed, 2021, para. 2), and "a huge victory" (Syed, 2021, para. 10) for the sector. There are several reasons for this view, including the strong emphasis on not-for-profit childcare contained in the government's commitment to spend \$30 billion over five years to create a national early learning and childcare system. The main reason, though, is that the budget explicitly recognized, for the first time, the importance of the sector and the government's responsibility to support it. "Canada's charities, non-profits, social enterprises, and other organizations provide vital services to our communities, including to the most vulnerable members of Canadian society. ... As we navigate our recovery, we must also bolster Canada's thriving social sector so that we can build healthy, resilient, and inclusive communities across the country" (Canada. Department of Finance, 2021, p. 206).

CONCLUSION

Many factors came together during the COVID-19 pandemic to change the way policymakers view and interact with the charitable and nonprofit sector. Key factors included the uneven impact of the pandemic on groups that comprise a large portion of sector workers and beneficiaries (e.g., women, low-wage workers, immigrants, racialized communities), the focus on racial justice brought about by Black Lives Matter and the discovery of unmarked graves at the Kamloops Indian Residential School, and the tireless efforts of charities and nonprofits that worked every day under difficult conditions to provide services and supports to Canadians. However, the sector's advocacy efforts cannot be discounted. From almost every perspective, the past 18 months have been one of the most active ever for the sector and this work has paid off in terms of policy outcomes.

In the next few years, the sector can use the policy window opened by the pandemic to advance key, long-standing policy goals. These include establishing a "home" for the sector within the federal government, developing fairer and more effective funding and accountability mechanisms, changing the rules that make it difficult for charities to partner with non-charities, and collecting more and better data about the sector. Whether it can capitalize on this opportunity, of course, remains to be seen.

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