

## QUESTIONS – ANSWERS # 1 - version as of April 6, 2021

After the webinars held on March 17 and the subsequent survey, below are the requested clarifications that we agreed to provide.

### **Two initial questions**

*This fall, Centraide talked about these changes (among others) when the campaign did not seem to be going as well. Then we found out that you had reached your campaign goals. Were these changes therefore already planned?*

Yes. We mentioned this at the webinar on October 29, 2020. We have needed to review our investment strategy for a long time. This review began before the health emergency and has become especially necessary both in terms of individual needs and social issues given the lasting effects of the pandemic.

We had anticipated that the expected decrease from the fall campaign would even prevent us from operating sufficiently for a period of time; however, the historic result will instead allow us to implement the transition period that we wanted.

*Is the \$2-million increase that was announced for the social investment envelope recurring?*

Centraide gets its revenues from the annual campaign. This means we have to start over each year and adjust our budget scenarios accordingly. Economic fluctuations, along with our ability to inform donors about social issues, our relevance, and the impact of what agencies do all influence our results. Recurring funding is never guaranteed. However, if revenues continue to stay at the same level, so will our investments in communities.

**Reminder of the 2 main slides presented (and requested!) during the webinar.**

## Reiteration of the orientations, basic principles and approaches of Centraide

### Strategic Orientations



BE AN AGENT OF CHANGE



WORK WITH EFFECTIVE AND RELEVANT ORGANIZATIONS



PROMOTE SYNERGY BETWEEN ALL STAKEHOLDERS



EVALUATE AND MEASURE IMPACT



COMMUNICATE CENTRAIDE'S EXPERTISE AND IMPACT

### Basic principles

- Empowerment and accompaniment of groups and individuals
- Inclusion
- Collective work

### Specific approaches to action

- Territorial approach – work with local communities
- Long-term funding
- Focus on outcomes
- Promote high standards of community action and leadership
- Make choices based on the community dynamics and the most urgent social problems
- Tuned to the needs and solutions coming from the communities

SUMMARY OF THE INVESTMENT STRATEGY 2021-2024 OF CENTRAIDE OF GREATER MONTREAL			
Strategic Social Development Orientations	Priorities 2021-2024	Investment Strategy centering Equity (EDI) and Impact, simple and agile	Changes
		Systemic Approach	
<ul style="list-style-type: none"> <li>• Be an agent of change</li> <li>• Work with effective and relevant organizations</li> <li>• Promote synergy between all stakeholders</li> <li>• Evaluate and measure impact</li> <li>• Communicate Centraide's expertise and impact</li> </ul>	<ol style="list-style-type: none"> <li>1. Strengthen our Equity, Diversity and Inclusion (EDI) Strategy</li> <li>2. Improve our capacity to report on the impact</li> <li>3. Participate in and support actions and projects aimed at pooling assets and expertise</li> <li>4. Contribute to positioning community organizations to benefit from the digital shift</li> </ol>	<ul style="list-style-type: none"> <li>• Strategy for Development of Communities enriched by the Collective Impact Approach</li> <li>• Capacity Building and Leadership Development Strategy</li> <li>• Accompaniment Strategy (ongoing relationship)</li> </ul>	<p>Coming soon with the progress of the EDI taskforce.</p> <p>Clear statement of desired outcomes in the contract</p> <ul style="list-style-type: none"> <li>• Collaboration and support to reinforce organizational capacity to report on outcomes</li> </ul> <p>Flexible fixed-term contracts based on</p> <ul style="list-style-type: none"> <li>• Our territorial analyses</li> <li>• Equitable financial support to the communities</li> <li>• Improved access to Centraide funding.</li> </ul>

### ***Centraide's equity, diversity and inclusion (EDI) strategy***

Centraide's openness to doing things differently and taking actions that help strengthen its equity, diversity and inclusion strategies to increase diversity is welcomed.

- *How will this work? Will you support agencies considered "diverse"? Will you support projects from all types of agencies that address issues that affect diverse communities? Will you create a Diversity Fund? Will you allocate a percentage of available funding to support diverse agencies?*
- *And what does a "diverse agency" mean?*

Your questions have been submitted to the EDI working group that was discussed during the webinar. Clear answers should be provided by the fall.

#### One orientation is already clear for Centraide:

- Given that "equity, diversity and inclusion" are not the same types of issues as food security or mental health,
- Given that EDI is a challenge but a necessary one for ALL agencies and in a cross-cutting way,

Centraide of Greater Montreal and the agencies and the projects it supports must take up this challenge of including all people in terms of both meeting their needs (food, housing, etc.) and developing their potential (youth success, etc.), regardless of their ethnocultural origins, first language, gender, sexual orientation and identity, or any physical or intellectual impairments.

## ***An impact-focused strategy***

The questions and comments received can be grouped as follows:

- *The importance of distinguishing between outcomes, effects and impacts.*
  - *Who is responsible for identifying the “intended impact”: Centraide, the agency, or the local community?*
  - *The timing when Centraide will advise agencies of changes to contracts, the amount of time that agencies have to identify relevant indicators and develop the necessary tools to capture and document them.*
  - *Be realistic about the ability of agencies to report on how they are achieving the “desired impact.”*
  - *Examples of desired results or impacts?*
  - *Access to support (financial and other) to build the knowledge, skills and capacities of agencies and communities so that they can capture their results and impacts.*
  - *Fear of an unwieldy and complicated process that becomes an obstacle to creativity.*
1. Developing tools to collect and promote the results for individuals is one of the five criteria that Centraide of Greater Montreal uses (and has used for many years) to assess the “performance” of the agencies and projects it supports. The primary goal here is and will be to foster a culture of evaluation, learning, and practice improvement at agencies, in a local community, and across Greater Montreal.
  2. We know that impact doesn’t happen overnight. Impact is influenced by political and economic choices that organizations like Centraide cannot control. However, experiences with collective action tend to show that joint efforts around clear and shared targets bring us closer to achieving the changes we want. Centraide is accountable for this impact; however, we cannot achieve results or measure short-, medium- and long-term effects that lead to this impact without your help, hence the importance of agreeing on the contribution expected from agencies.
  3. Centraide of Greater Montreal is currently working to explicitly state its target impacts at the local community level or at a more regional level. This will let us build collaborative partnerships with the agencies and communities whose outcomes and impacts are most likely to contribute to the intended changes.
  4. The lessons we have learned with many of you through the ÉvalPop, ÉvalPic and other evaluation projects will be used in our leadership and skills development strategy. We want to work with you on simple and concrete ways to capture the effects of your actions without unnecessarily burdening this process; the goal is in fact to foster learning, creativity and innovation.

We aren’t yet able to announce a more specific and detailed timeline for the implementation of these changes. Your questions and comments are helping us clarify a realistic timeline that can be done within our respective constraints. However, one thing is certain: this change will be gradual and will account for agencies’ ability to adopt it. Centraide will support agencies in this transition, particularly through its leadership and skills development strategy.

## ***A simple and agile strategy***

The agility that Centraide is asking for has raised issues and elicited responses about the ***accessibility*** of its funding. The questions and comments received on this subject can be grouped as follows:

- *Access to emergency funds in 2021-2022.*
- *Access to Centraide's regular funding for agencies supported through one of the emergency funds.*
- *Accreditation, certification and recognition of new agencies by Centraide of Greater Montreal.*
- *Whether or not charitable status is required, including for faith-based agencies.*
- *Consistency (in terms of eligibility) with other Centraides.*

1. As we saw last year, no emergency funds have been announced or are planned.
2. Centraide has decided to work with agencies or collective projects that are best able to contribute to the desired changes (see section on impact), particularly to increase the inclusion of all people living in Greater Montreal (see section on EDI).
3. Centraide may work with agencies that are currently funded on a regular basis, agencies that only received support from one of the emergency funds in the past year, or agencies that have never been supported by Centraide.
4. The process for accessing Centraide funding (which will no longer be referred to as "acceptance") must be reviewed accordingly. For transparency purposes, the following statement has been posted on our website:

### ***FUNDING APPLICATIONS TEMPORARILY SUSPENDED***

*We are currently conducting an in-depth review of our investment strategy. As a result, we have temporarily suspended the bank of agencies awaiting funding from Centraide. The new acceptance conditions will be detailed on this page as soon as they are available.*

5. We again want to stress the message expressed during the webinar: Centraide of Greater Montreal wants to prototype different options to promote greater access to its financial support. We also want to test these options with an oversight committee to select the best possible option.
  - We talked about creating this oversight committee during the webinar. This group of about 15 people will act as a "sounding board" to help Centraide deploy its investment strategy so that we can achieve the desired impact and expected results.
6. Each Centraide has an independent investment strategy. This principle allows us to adapt to the realities of the communities we work in. The nature of the agencies supported, the length of contracts, and the amount of funding vary for each Centraide.
7. Eligibility criteria will therefore be updated, particularly to be consistent with the provisions issued by the Canada Revenue Agency.

The agility that Centraide is asking for has raised issues and elicited responses about the **varied duration of contracts**. The questions and comments received about this subject can be grouped as follows:

- *Transition from current to new contract lengths*
  - *Nature of projects and activities for one-year contracts*
  - *Advance notice to agencies to find alternative funding*
  - *Identification of risks*
    - *Competition between agencies*
    - *Psychological distress and burnout due to financial insecurity*
8. There will be greater agility with fixed-term contracts that may be for one, three or five years.
9. The three-year contract will continue to be the most common format, as it embodies one of Centraide's trademark features of providing long-term fixed funding for operations.
10. Eligibility requirements for one- and five-year contracts will be specified in the *Administrative Rules*, reviewed in light of the new investment strategy, and adopted by Centraide's Board of Directors by no later than December 2021.
11. REMINDER: This "agility" will not consist of an annual tidal wave of abrupt funding cuts. The importance of the ongoing relationship, which we reaffirmed earlier, means that this agility must be developed through respect and discussion. There must be no surprises about the end of contracts, and changes will be planned and announced several months in advance. Transition measures could also be put in place to facilitate these changes.
12. The perception of "competition" already exists between agencies currently supported by Centraide and those applying for and waiting for funding. This concern raised goes a long way to explaining our choice of priority of sharing, which we will come back to in a few weeks. Centraide aims to support various forms of inter-agency and inter-neighbourhood collaboration.

The agility that Centraide is asking for has raised issues and elicited responses **about the need for greater equity** in terms of Centraide of Greater Montreal's investment in local communities in our territory. The questions and comments received about this subject can be grouped as follows:

- *Equity between sectors, communities or neighbourhoods*
  - *Deadline for submitting this request for information (place of residence of people using the agency's services)*
  - *Adaptations for agencies covering multiple neighbourhoods or an entire region*
  - *Getting agencies involved in reflecting on the richness of this regional/local tension*
  - *The concept of equity in potential funding for each community*
    - *Impact of the concentration of people in need*
    - *Impact of the concentration of agencies in the same community*
    - *Impact of gentrification on certain neighbourhoods*
13. The equity at stake here relates to the different local communities in Centraide of Greater Montreal's territory and is rooted in our community development strategy.

14. There is no such thing as perfect equity. However, only taking into account the agency's address, regardless of who the agency actually serves, generates the majority of the imbalances mentioned in your questions and comments, and we are sensitive to these imbalances. This is why we need to better capture the actual territory served by agencies.
15. The profile that you are asked to complete every summer will include a question about this with multiple choice answers. This question has been tested with a number of agencies that serve different areas, and we are confident that the multiple-choice format will give us sufficient information without making the report more work to complete.

### ***About our Leadership and Skills Development (LSD) support***

The questions and comments received can be grouped as follows:

- *LSD needs for both agencies and communities to improve their practices in terms of EDI, impact, capacity building.*
- *The need to expand LSD services in English.*
- *Access to this support for agencies that are not financially supported by Centraide of Greater Montreal.*
- *Diversity and equity in partnerships between training agencies and Centraide of Greater Montreal.*

Centraide of Greater Montreal started the evaluation of its 2017-2021 LSD strategy in support of its 2017-2021 Strategic Orientations. This evaluation should be completed by early fall. The lessons learned from this evaluation, your feedback, and the support needs identified by Centraide's four priorities (listed in the table above) will be used to develop an LSD strategy for 2022-2024 to support the roll-out of the new investment strategy in time for April 1, 2022.

***Thank you for sharing your questions and comments with us.  
They have given us a lot to think about and motivate us to listen with respect and transparency.  
Sincerely,***

***The Social Development Team  
Centraide of Greater Montreal  
April 7, 2021***