



Philanthropic Foundations  
Canada

Fondations  
Philanthropiques  
Canada

ANNUAL REPORT 2023

# The Story of 2023: Building Towards the Future

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Philanthropic  
Foundations  
Canada

# About PFC

A registered charitable organization, [Philanthropic Foundations Canada \(PFC\)](#) is Canada's national philanthropic network, working together towards a more just, equitable and sustainable world.

In collaboration with civil society, business, and government, PFC advances the common good, through network capacity building, collaboration initiatives, and policy & research.

Our membership is comprised of private and public foundations, charities, non-profits, donor advised funds, and corporate giving programs whose primary purposes are grantmaking. They range in asset size from less than \$1M to well over \$1B and are situated across Canada.

With \$135B in capital stewarded and invested by Canada's 10,000+ foundations, and close to \$10B granted annually, PFC believes that philanthropy – and the charitable and nonprofit sector more broadly – is at an exciting tipping point for transformative impact

Together, our membership represents the majority of all assets of public and private foundations in Canada.

# Messages from our leadership

## From the President & CEO

Dear colleagues:

Our 2023 Annual Report showcases the important work PFC and its network of diverse philanthropic foundations have undertaken this past year to strengthen Canadian philanthropy – in all of its diversity – in pursuit of a just, equitable, and sustainable world.

From leadership on some of the most historic regulatory changes affecting our sector in decades, to building trust and sharing learnings with peer communities from coast to coast to coast, the imagination, innovation and impact of PFC members continues to inspire.

PFC programming and initiatives are deeply driven by this inspiration. Your work is what creates our path toward advancing the common good together.

So, I invite you to explore the work we've undertaken as we describe in this report. And, I encourage you to reflect on how it has advanced your work and our sector, and what we should be striving towards collectively, together in the future.

Philanthropy's investments in people, communities and issues contributes to shaping our lived experience and possible future. This work requires being responsive to evolving needs, and ways of doing. The value of collaboration in philanthropy is that it helps us to these ends, as accessing diverse perspectives helps to break down silos. It offers opportunities for trusting and challenging one another, and is the basis for continuous learning and growth.

In September 2024, we will be marking a quarter of a century of PFC at our [national conference](#) in Ottawa. On this occasion of our 25th anniversary, it remains clearer than ever that Canadian philanthropy continues to evolve. Following a large consultation with our members that reiterated the ambitious aspirations for more impactful and inclusive philanthropy, we are building our next strategic directions for 2025-2028.

We look forward to sharing our plans with you later this year.

In gratitude,



A handwritten signature in black ink, appearing to read 'Jean-Marc Mangin'.

**Jean-Marc Mangin**  
President & CEO  
Philanthropic Foundations Canada  
*Wakefield (Ottawa-Gatineau Region), QC*

# From the Chair of the Board of Directors

Dear colleagues:

As grantmakers, our work has always been rooted in the notions of trust and challenge. And, more than ever before, I see my foundation peers across Canada asking hard questions of themselves and their organizations because of that deeply-held veneration for trust.

It is no secret that we are in a moment of urgency. How will we meet this moment? For me, it's with empathy, with humility, and with my community of philanthropic peers alongside me.

For me, PFC is the space that exists in our sector for exploring how foundation philanthropy can collectively help to shape our potential. The platforms and opportunities provided at PFC for professional growth, sense-making, and deepening impact are inimitable.

Following in the footsteps of PFC's past Chair, Patty Faith, I am now one year into my term as PFC's Board Chair and I could not be prouder of the work we've accomplished together as a network.

PFC members can take confidence in the strength of their network's board, committees, and staff. And it is YOUR network, so I encourage you strongly to participate however and whenever you can. Together, we can strengthen Canadian philanthropy – in all of its diversity – in pursuit of a just, equitable, and sustainable world. And, frankly, it would be impossible without you.

In this moment, where our identities, truths, and values are being challenged in ways few of us have ever experienced, I have never felt more certain about the value of PFC. As our operating context and the challenges before us continue to change, and as we seek to build trust in all our relationships, engagement with the diverse community that is PFC can ground us all in this work.

Sincerely,



*Simon Mallett*

**Simon Mallett**  
Chair, Board of Directors  
**Philanthropic Foundations Canada**  
Executive Director  
**Rozsa Foundation**  
Calgary, AB

# Highlights of our work in 2023



## Building capacity and learning: Funder Affinity Groups

The Affinity Groups stewarded and promoted by PFC are formal or informal collaborations of grantmakers, sharing knowledge and information, and engaging in collaboration on particular issues.

Their structures and formats vary, depending on the needs and interests of the participants, and their leadership structures.

### Arts Funders Affinity Group

This group fosters conversations among philanthropic arts funders who are currently, or are considering, funding in Canada's arts and culture sectors and are motivated to convene, share insights, discuss meaningful support strategies, and explore how philanthropic arts funders can leverage collective action for greater impact.

Spearheaded by a group of PFC members, this group convened for the first time in 2023, with support from PFC. Its structure and format are in development.

[Learn more here.](#)

## Communications Affinity Group

Originally developed and led by peers outside of PFC, this monthly forum with PFC at the helm was kicked off in early 2023.

It is now an active PFC-led and participant-driven space for practitioners from across the network to meet regularly to discuss important or emerging communications and public affairs issues relevant to Canadian foundations, philanthropy, and the wider non-profit and charitable sector. Participants are surveyed regularly for roundtable and workshop topics, and occasionally pool resources for shared professional development opportunities.

Learning topics in 2023 included expert-led presentations on government relations, media training, and digital communications and accessibility, as well as more informal roundtable discussions on issues such as data reporting, narrative change and impact storytelling, and more.

[Learn more here.](#)

## Early Child Development Funders Working Group

This is a peer-led group of foundations committed to supporting children across Canada through their grantmaking and other activities as leaders in the sector. It serves as a resource to its membership, supporting collaboration and knowledge sharing toward improving the effectiveness of philanthropy relating to young children. Many engaged in this group are PFC members, though it operates independently, with PFC playing a promotional partner role.

[Learn more here.](#)

## Healthy Aging Affinity Group

This group was formed in 2023, starting with a three-year commitment, by a group of funders who want to work together to have impact across Canada in the healthy aging sector into the future. Led by two foundation leader co-chairs, it is shaping up to be a peer-learning space by and for funders who recognize that supporting older adults is a crucial, yet under-funded area that philanthropy can help strengthen. Together, their aim is to foster a collaborative community, exchange leading practices, share knowledge, and explore how to leverage collective action for greater impact.

[Learn more here.](#)

## Mental Health and Wellness Affinity Group (MHWAG)

MHWAG [em-aetch-wag], as it is affectionately called, seeks to mobilize philanthropic resources to strengthen the mental health and wellness sector. It is a peer-driven group of foundations and other grantmakers interested in advancing issues related to mental health and wellness through their granting and other work as sector leaders. The group meets regularly to discuss opportunities to work on initiatives together, cultivate ideas, exchange information, and build their impact by learning and sharing from one another. While many engaged in this group are PFC members, it operates independently, with PFC playing a promotional partner role.

[Learn more here.](#)

## Program and Grantmaking Staff Affinity Group (PGSAG)

Perhaps our largest and most active Affinity Group, PGSAG [pee-gee-sag] is a program staff-led monthly group get-together where PFC member participants discuss and learn about topics relevant to their work as program and grantmaking staff. At their monthly “Rendez-vous,” external speakers as well as group members are typically featured in a workshop or roundtable format. Participants of this group find value in joining to discuss opportunities to work on initiatives together and exchange ideas, good practices, and other information, and to build their impact by learning and sharing from one another.

[Learn more here.](#)



# Regional Member Gatherings

Early in 2023, PFC made the strategic decision to move its national conference to a biannual cadence. One consideration was that we wanted to increase our prioritization for coordinating with colleague organizations across the country where PFC members may also participate, to help avoid event overlap. We also wanted to devote more resources and time to meeting with our members where you are, so we have planned to offer regional member gatherings in-between conference years.

In 2023, we hosted successful gatherings across many major cities in Canada, including Halifax, Montreal, Ottawa, Toronto, Calgary and Vancouver. The gatherings were hosted at PFC offices or by a PFC member, and usually organized around a theme with an expert-led presentation on a topical subject, followed by a reception or shared meal. This format allows for opportunities for learning and engagement as well as informal conversations and connections with local peers, and has received overwhelmingly positive reviews.



## Gathering Together to Learn and Collaborate



# PFC Network Collaboration Initiatives



## CEO Retreat

PFC's CEO Retreat is an annual in-person gathering and community of peers for PFC member CEOs to discuss key issues and important developments in our sector.

Over the years, the event has led to new collaborative initiatives and approaches that have served participants, their organizations, and communities in many different ways.

In 2023, the retreat was held at the Banff Centre in Alberta. The rejuvenating energy provided by the sheer natural beauty of Banff inspired open, creative, and candid conversations under Chatham House Rules amongst the group. The gathering garnered unparalleled opportunities for deepened peer connections, and sparked many new ideas for how to tackle some of the most pressing questions and challenges uniquely faced by foundation leaders. A key tangible outcome from this event was the development and creation of PFC's CEO Peer Support Group.

[Learn more here.](#)

## CEO Retreat 2023 Banff Centre in Alberta



## CEO Peer Support Group

Born from conversations that took place at PFC's 2023 CEO Retreat, this peer-driven initiative hosts calls with PFC member organization leaders from across Canada in order to sustain conversations throughout the year. The Peer Support Group provides a venue for the regular sharing of sector intel and information, peer relationship cultivation, and mutual support. Topics and speakers are engaging and vibrant, and participants have ample opportunity to connect with one another.

[Learn more here.](#)

## Investment Roundtable

The Investment Roundtable continues to attract interest from across our network and membership – from small family foundations to large corporate foundations – to engage staff and board members alike who oversee their foundations' investment portfolios. The group serves as a safe learning and sharing space to discuss pertinent investment-related issues.

In 2023, the group focused our attention on peer learning across the spectrum, with conversations on topics such as traditional investing, impact investing, investment-related news and regulatory developments, and trouble-shooting role-specific challenges with peers.

## Justice, Equity, Diversity, and Inclusion (JEDI) Accelerator

This year-long program was developed for foundations looking for an intensive educational peer-learning platform that focused on the unique needs and operating environments for funders, to help them bring justice, equity, diversity and inclusion to life throughout their organization – from governance to grantmaking.

In 2023, PFC ran a second cohort of this popular learning program, with five participating funders, each with a board/staff team made up of 2 to 4 people. Our mid-term evaluation results told us that 77% of participants now have a better understanding of the basic concepts related to justice, equity, diversity and inclusion; that 91% have more clarity about how to build a Justice, Equity, Diversity and Inclusion action plan; and, that 86% feel their foundation is better equipped to take action on matters pertaining to justice, equity, diversity and inclusion. The program is being reviewed and consideration is being given as to what a next iteration of the offering will look like.

# Partnership Projects

Outside of the offerings PFC manages and curates for our network, we are engaged in a number of other partnership projects to advance our mission to strengthen Canadian philanthropy in all of its diversity.



## Canadian Philanthropic Commitment on Climate Change

An ongoing project we have been housing since 2021 has been the Canadian Philanthropy Commitment on Climate Change. Co-led by PFC, Community Foundations of Canada, The Circle on Philanthropy, and Environment Funders Canada, this initiative supports funders across Canada to signal their commitment and to act on climate change, regardless of their respective missions.

In 2023, a major milestone was the release of the project's [first implementation report](#), which aims to serve as a candid assessment of the progress made over the course of the first year for the climate pledge's 56 signatories, while also highlighting the challenges that many foundations encountered.

[Learn more here.](#)

# Funders in the Nonprofit Data Ecosystem

Working with the Ontario Trillium Foundation, Ontario Nonprofit Network, and Canadian Centre for Nonprofit Digital Resilience, PFC co-hosted various convenings with funders across our networks to explore our role in the nonprofit data ecosystem. The goal is to explore and create a shared understanding of the current state of the nonprofit and philanthropic data and learning ecosystem, how we might collectively support a thriving data and learning ecosystem that centers the needs of nonprofits and charities and explore opportunities for ongoing dialogue and collaboration.

[Learn more here.](#)

Throughout 2023, PFC worked with many partners on the creation and delivery of a range of other responsive programming, resources and events for the benefit of the PFC network and the wider sector. Here is a selection:

- Webinar series with the Mott Foundation on the ways in which funders could engage on supporting Ukraine
- Book launch event for former PFC President Hilary Pearson's book *From Charity to Change*
- Webinar on new regulatory guidelines for foundations and other charities now able to grant to non-qualified donees
- The development, publication and dissemination of [Funding Journalism: A Guide for Canadian Philanthropy](#) in partnership with Inspirit Foundation and the Local News Research Project at Toronto Metropolitan University





# Policy and Research



## Public Policy

2023 saw the implementation of several new major regulatory changes significant for foundations and other charities in Canada.

The [increase to the disbursement quota](#) (from 3.5% to 5% for assets over \$1M) began applying to charities' financial periods starting on or after January 1, 2023. (Calculations remain the same, including a two-year window to meet the DQ rate of each year. This means charities have until the end of 2024 to meet their disbursement rate for 2023 and 2024).



In 2022, new legislation was adopted by Parliament permitting granting to non-qualified donees – organizations in Canada and internationally that engage in charitable activities, but do not have registered charity status. With input from PFC, the CRA created [new guidelines](#) to help charities understand and implement the new rules, which were finalized and published in late 2023.

PFC was and continues to be a leading sector voice at the forefront of some of the most important regulatory changes in the last 20 years, while serving as a key expert and resource across the network and beyond through blog posts, articles, webinars, speaking engagements, and more.

To help ensure PFC members are well-informed about regulatory issues that affect foundations and grantmakers, PFC sends out special policy advisory emails directly to members when issues arise, and we have created a special policy advisory section on our website where the advisories are housed – it [can be found here](#).

## Research

PFC Phi-Lab Post Doctoral Fellowship in Philanthropy and Public Policy In 2023, PFC welcomed a Post Doctoral Fellow in Philanthropy and Public Policy to the team, thanks to a partnership between PFC and PhiLab, the Canadian Philanthropy Partnership Research Network. This role was a pivotal one for PFC.

The Fellow worked over the course of 2023 to help PFC evolve its bi-annual snapshot of the philanthropic sector research report, with a focus on developing a new model and first-edition new regular signature research framework for telling a fuller story of the key impacts that philanthropy has on Canadian society. Providing a more fulsome account of what the philanthropic sector is and what it serves to do, this new report, entitled *An Evolving Landscape: Reflecting Canada's Philanthropic Foundations*, will be a major value-add to help policy-makers, the public, and our own sector better understand more comprehensively the functions, impacts and effects of the philanthropic sector in Canada.



PFC is also building closer ties to Carleton University and its Master of Philanthropy and Nonprofit Leadership program. The MPNL is the only graduate curriculum in Canada that offers specialized skills for leadership positions in the philanthropic and nonprofit sector, and along with PhiLab, it is among Canada's few research hubs interested in building and understanding our unique and growing sector.



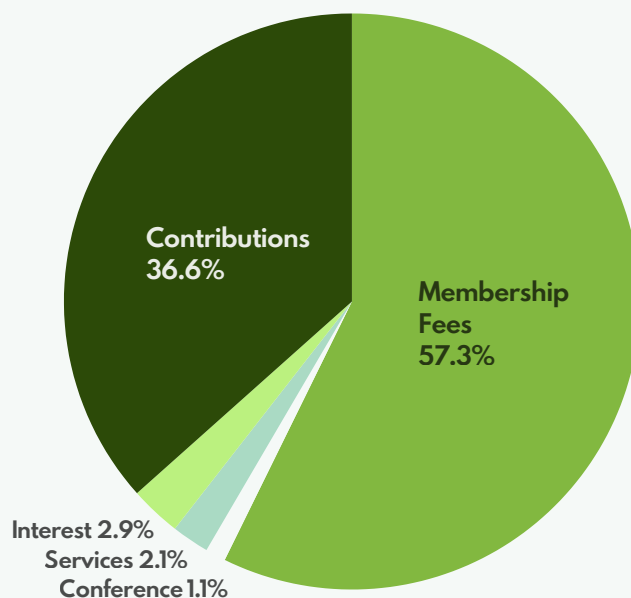
In 2023, PFC launched a consultation process with its members and partners about its future directions. Over 80% of members participated in the process. Based on this input and research insights, PFC is developing its new 2025-2028 strategic framework that aim to strengthen the impact of philanthropy in a more fragile and polarized world.

# Financials

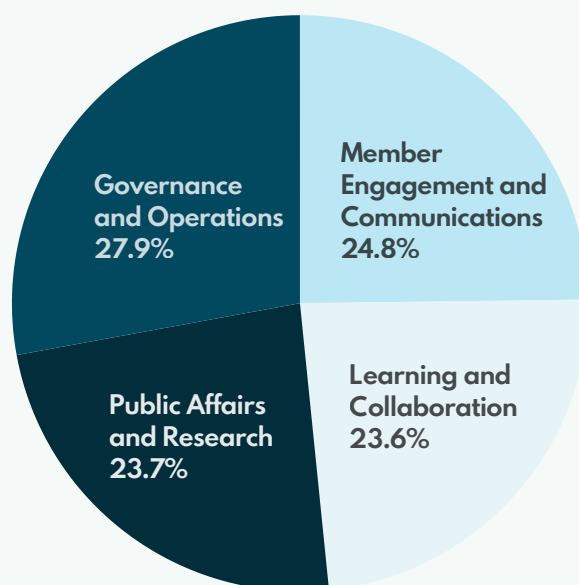
## Statement of revenues and expenses

Year ended December 31, 2023

Operations	2023 \$	2022 \$
<b>Revenues</b>		
Contributions	573,000	423,000
Membership Fees	897,000	855,000
Conference	18,000	356,000
Services	33,000	-
Interest	45,000	18,000
	<b>1,566,000</b>	<b>1,652,000</b>



<b>Expenses</b>		
Member Engagement and Communications	370,000	314,000
Learning and Collaboration	352,000	683,000
Public Affairs and Research	354,000	281,000
Governance and Operations	416,000	364,000
	<b>1,492,000</b>	<b>1,642,000</b>



<b>Excess</b>	<b>74,000</b>	<b>10,000</b>
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# Our team

## Staff



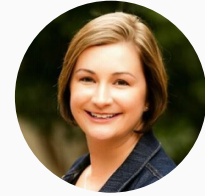
**Krista Bissiallon**  
Coordinator,  
Learning  
& Collaboration  
*Sault Ste. Marie, ON*



**Benoît Charlebois**  
Senior Coordinator,  
Communications &  
Member Engagement  
*Rural Québec, QC*



**Inès Chaâlala**  
Director,  
Learning  
& Partnerships  
*Montréal, QC*



**Michele Fugiel Gartner**  
PFC-PhiLab Post-Doctoral  
Fellow in Philanthropy and  
Public Policy  
*Calgary, AB*



**Laetitia Gill**  
Senior Advisor,  
Learning  
& Partnerships  
*Montréal, QC*



**Liza Goulet**  
Director,  
Member Relations &  
Research  
*Montréal, QC*



**Sara Krynitzki**  
Director,  
Public Affairs  
& Research  
*Toronto, ON*



**Bruce Lawson**  
Senior Advisor  
to the President  
& CEO  
*Toronto, ON*



**Jean-Marc Mangin**  
President & CEO  
*Wakefield (Ottawa-  
Gatineau Region), QC*



**Erin Matheson**  
Executive  
Coordinator  
*Montréal, QC*



**Aviv Milgram**  
Director,  
Member Engagement  
& Communications  
*Montréal, QC*



**Erika Miller**  
Program Coordinator  
*Montréal, QC*



**André Pawan Vashist**  
Director,  
Learning  
& Collaboration  
*London, ON*

# Board



**Amanda Bernard**  
Director of Indigenous Programs  
*Laidlaw Foundation*  
Toronto, ON



**Djaka Blais-Amare**  
Board Co-Chair  
*Foundation for Black Communities*  
Vancouver, BC



**Adwoa K. Buahene**  
Strategic Consultant  
Toronto, ON



**Jean-Marc Chouinard**  
Former President  
*Lucie and André Chagnon Foundation*  
Montréal, QC



**Patty Faith (Past Chair)**  
Chief Brand and Reputation Officer  
*Medavie*  
Halifax, NS



**Genesa Greening**  
Chief Executive Officer  
*Vancity Community Foundation*  
Vancouver, BC



**Ina Gutium**  
Vice-President,  
Talent & Corporate Services  
*Ontario Trillium Foundation*  
Toronto, ON



**Simon Mallett (Chair)**  
Executive Director  
*Rozsa Foundation*  
Calgary, AB



**Teresa Marques**  
President & CEO  
*Rideau Hall Foundation*  
Ottawa, ON



**Amanda Mayer (Treasurer)**  
Program Director & COO  
*Lawson Foundation*  
Cantley, QC



**Cameron Miller**  
Senior Director, Citizenship Governance &  
Operations for Corporate Citizenship  
*RBC Foundation*  
Toronto, ON



**Rachel Renaud**  
President  
*Roasters Foundation*  
Montréal, QC



**MJ Sinha**  
Former Board Member  
*The Hederleigh Foundation*  
Toronto, ON



**Justin Wiebe**  
Lead,  
Innovation and Strategic Growth  
*Mastercard Foundation*  
Toronto and rural Saskatchewan, SK

The people behind PFC are at the centre of our impact as a national network. In addition to our staff and board, PFC also hosts a number of committees, which are comprised of board members, and volunteers from PFC members and partners, with PFC staff support. Learn more about the important leadership of our committees [here](#).

# Our network and partners

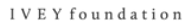
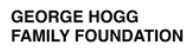
## PFC Members

As PFC grows and evolves, we're incredibly thankful for the support and engagement of our membership.

Below are our 2023 Members from January 1 - December 31, 2023.

[Learn more about PFC members here.](#)





Martin Family Initiative  
Initiative de la Famille Martin





PFC Annual Report 2023



THE O'NEIL FOUNDATION

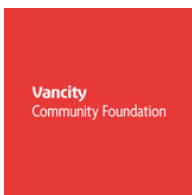
Otto & Marie  
Pick Charitable  
Foundation



Roadburg Fund  
Ronald S. Roadburg Foundation



THE SONOR FOUNDATION



The  
Walter J. Blackburn  
Foundation



THE WINDSOR  
FOUNDATION



T.Y.W.F  
The Youssef-Warren  
Foundation

## PFC Partners

In addition to the critical revenue we receive from membership contributions, PFC also receives grants and other generous support from our members and other sector leaders - essential support for our special projects and growth strategy.

**The Azrieli  
Foundation**

**McCain  
Foundation**

**The Calgary  
Foundation**

**The McConnell  
Foundation**

**Clarus  
Foundation**

**The Murray R.  
O'Neil Charitable  
Foundation**

**Community  
Foundations of  
Canada**

**Ontario Trillium  
Foundation**

**The Counselling  
Foundation of  
Canada**

**Pathy Family  
Foundation**

**de Gaspé Beaubien  
Foundation**

**Rideau Hall  
Foundation**

**Fondation Lucie et  
André Chagnon**

**The Rossy  
Foundation**

**Fondation Mirella &  
Lino Saputo**

**Suncor Energy  
Foundation**

**Good  
Foundation**

**Toronto  
Foundation**

**The Lawson  
Foundation**

**Trottier Family  
Foundation**

**The Lyle Shantz  
Hallman Charitable  
Foundation**

**The Waltons  
Trust**

**Mastercard  
Foundation**

**Weston Family  
Foundation**

# Looking Ahead



A landmark initiative for PFC in 2024 will be our [national conference Together 25 Ensemble](#), taking place in Ottawa September 23-25, 2024. At our conference, we will mark 25 years of our organization, and bring together more members, other grantmakers, and philanthropy ecosystem partners than ever before.

We are designing a conference experience that combines learning, dialogue, and collaboration to enable our network to further its role and imagine what's possible in our work towards advancing a just, equitable and sustainable future.

## **Together** **Ensemble**

Building off the incredible efforts of the PFC staff, board, committees and network in 2023 and throughout 2024, PFC is working steadfast toward our next strategic plan for 2025-2028. This includes a fresh renewed policy agenda, brand-new research agenda, and dynamic learning and collaboration plans in the works, all of which will be shared with our network later in 2024. As a result of the generous and thoughtful contributions of our network to our strategic planning consultations rolled out in 2024, PFC's future work is looking more relevant, meaningful, and significant to our sector than ever.



# Join us

Become a member to leverage your sector leadership for the common good.



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🖱 [pfc.ca](http://pfc.ca)

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