



Lawson Foundation Learning Example

This foundation learning example is part of the Approaches to Learning Amid Crises: Reflections from Philanthropy report, which showcases a series of learning examples aimed to support philanthropy in learning from doing while changes are still underway. In this report, we lift up examples of how foundations have reacted and, specifically, highlight what and how they are learning. We spoke with leaders from seven Canadian and American foundations to learn from their actions during the first several months of the 2020 crises related to COVID-19 and the widespread acknowledgement of systemic racism and racial inequity. We focused on what they did, how they did it, and what it means from the perspective of organizational learning and evaluation. This is one of those seven foundation learning examples.

At the heart of our inquiry, we were guided by these two questions:

- 1 How does a foundation's learning culture shape its capacity to act and adapt during a crisis?
- 2 How do relationships between funders and grantees shape their capacity to learn together?

We encourage you to reflect on these questions in your own context as you read through this case study.

Interviewees were asked to reflect on how their foundation responded during the first four months of the crises, beginning in March 2020 at the start of COVID-19 lockdowns in North America, and through the widespread protests in June 2020 after George Floyd's murder. Interviewees were asked to share what actions they took, and what informed their decision-making. Our conversation was semi-structured with the goal of telling instructive stories about how learning helped to shape action.

This foundation learning example represents real-life experiences, but not necessarily best practices.

It does not cover all aspects of the foundations' inner workings or thinking, but rather offers a point-in-time snapshot through the eyes of the interviewees. The issues explored here could be unpacked further and in much greater detail. As such, they may leave the reader with more questions than answers, which we consider a positive (albeit potentially frustrating) outcome.

Lawson Foundation

Interviewee:

Marcel Lauzière
President and CEO

Date:

July 2020

Background

The [Lawson Foundation](#) is a Canadian family foundation based in Toronto, with over 60 years of philanthropic giving. It currently employs seven staff members. In 2019, it granted over CA\$6 million in support of several impact areas related to early child development, outdoor play, child and youth diabetes, youth and the environment, and support for charitable infrastructure.

Responding in times of crisis

The COVID-19 crisis challenged the Foundation to work differently in some ways, but in others, the crisis represented more of an evolution in the way the Foundation already worked.

As a team, staff were already comfortable working virtually, with staff spread out in different parts of Ontario and Québec. This meant that the team already was set up to act quickly when the crisis hit and had developed a culture where the digital tools, communication processes, and support systems didn't need to be implemented or learned on the fly. Similarly, the Foundation benefited from having a nimble Board that was willing and able to work differently.

As the scale of the crisis became clear, the Foundation quickly decided to put its strategic funding on hold and focus its efforts on responding to the COVID-19 crisis. The Foundation's initial response consisted of a number of initiatives.

In late March, the Board of the Lawson Foundation allocated CA\$2.7 million to a [COVID-19 Response Fund](#) with these elements:

- An early emergency response phase to meet immediate community needs (CA\$780,000) through pop-up granting teams across the country
- A collaborative COVID response fund with the London Community Foundation (CA\$300,000) directed toward a CA\$1 million pooled fund led by the London Community Foundation

I'm able to call on the Board for decisions on a regular basis through email or Zoom calls. This morning, for instance, we have seven or so grant decisions to make, and this will be done through email. We will only have a Board call if one or more Board members raise an issue that needs further discussion. We have a small Board of nine members, and they understand the importance of moving fast.

- A fifth generation family component (CA\$100,000 for COVID-19 responsive granting)
- A fund specifically to support Indigenous organizations and communities during the pandemic (CA\$800,000)
- A second phase of support (CA\$800,000) for organizational stabilization and support during the COVID-19 crisis for key organizations relevant to the Foundation's impact areas

The pop-up grants were targeted at different communities across the country. This approach was designed to be responsive and efficient as well as cater to different needs as defined by the communities themselves.

“ Our emergency response started by creating six pop-up granting teams across the country in different areas so we could learn. These communities were: Vancouver; Saskatchewan; Perth/Lanark; Gatineau; St. John, New Brunswick; and Nova Scotia. Each granting team had six members that were set up with trusted members (this was a new experience for Board members). The Foundation gave each team CA\$130,000, but we made it clear that decisions would be community-driven as opposed to coming from us. Within two weeks, several hundred thousand dollars went out the door.

We were listening to organizations on the ground about the kinds of things they were dealing with. All of the funding was unrestricted. We asked for a one-page update from each organization sometime down the road. We're also asking for a report from each pop-up team to see what we can learn and how we can build that into our strategic approach going forward. None of this was in our strategic approach that was approved last December.

The Foundation's approach overall was based on both the trust they had in their partners as well as the recognition of the uncharted waters of the time. There was also an open acknowledgement that they weren't going to have all the answers and that they would need to rely on different kinds of data to make decisions.

“ We focused on fast learning. I think we're pretty much an evidence-based organization already. In general, we start with systematic reviews and always have a process for looking at the data. We've been open about throwing quantitative data out the window right now. Instead, we've relied on different kinds of evidence from our pop-up teams who are on the ground, and trust that these teams know their communities and have thoughtful conversations around how much money was available. It's been a learning experience that 'evidence' can come in many forms. The pop-ups, for instance, are small dollars. We're not going to evaluate the impact, but we trust that it will make a difference. A bit of a downside in that approach is that we won't have as much data around how the money was used as a whole.

The pop-up teams were set up quickly. The first week was used to set up the teams, and in the second week we sent out the dollars. It wasn't like we went back and forth with our partners, but was also

less of a need for this because we weren't imposing anything on them. They used different models, which was interesting to see. One team wanted to work with the local United Way and community foundation. Others went directly to organizations they knew.

Similarly, the Foundation began to rely more heavily on intermediary organizations such as Imagine Canada, Pillar Nonprofit Network, the Ontario Nonprofit Network, and the YMCA for information and data on what the nonprofit and charitable sector was dealing with. This information helped to further inform on what challenges the sector was facing as well as the scale of the problem. Aside from granting, the Foundation also took steps to reach out to its existing grantees in the spirit of open communication around their priorities. This wasn't a new concept for the Foundation, but rather reflects something the Foundation has been thinking about for a few years in terms of how to be responsive and supportive.

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We wrote to our grantees early on to ask how they were doing, ask about their fundraising, if they've let people go, etc. and, at the end, encouraged people to reach out to us and let us know how we could help. We got about a 20% response rate, and this wasn't a survey. It was people writing emails to me. I'm not sure what to make of this. I was expecting more grantees to come forward. It tells me that engagement and accountability is an ongoing issue. Maybe this is one of the learnings of COVID. Under normal circumstances, we wouldn't have written to grantees, asking them how they were doing.

A few years ago, we undertook a project to gather feedback from our grantees that highlighted that our grantees felt that Lawson didn't always understand their organization as well as they wanted. The message we took was that grantees want to see us more and be more connected. We did our work during COVID with grantees via Zoom and learned we could do a lot more 'site visits' this way. One of our key learnings is that we will be able to do grantee engagement a lot more effectively. It seems like an obvious thing to say, but why didn't we do this before?



At the same time, the Foundation isn't resting on its laurels and sees an opportunity in this crisis to have deeper conversations as a staff and Board team on some of the broader issues in philanthropy.

“Our strategic direction was approved last December. If we were to do it now, I think it would be a bit different. I think there would be more emphasis on being community-driven now. This is something I'm struggling with a bit myself. What does this mean for how we do our work as a foundation? I'm not sure how much is linked to COVID and how much is linked to other conversations over the last year to year and a half. For example, unrestricted funding and wanting to know more about grantees—we've always done some unrestricted funding for some grantees. At minimum, COVID will allow us to have these conversations with our Board. Even if it doesn't bring in new data, it brings context.



Learning Insights

The response of the Lawson Foundation illustrated two central tenets of how the Foundation approaches learning: trust and developing strong relationships. These habits are reflected in how they work internally and also in how they work with others. They did not emerge overnight but rather took time to build.

Internally, the Foundation has developed spaces and processes that encourage critical reflection and learning. An experienced staff team works well with an engaged Board that values their input. Getting to this place took time and relied in part on the ability of staff to effectively communicate and share with the Board what they were hearing and learning. While staff do provide evidence to the Board, they also work hard to understand where Board members are in their thinking and their priorities—in other words, their learning goals and their culture—before bringing information forward.

Within the staff team, there is trust in one another to get the work done. Some staff may work different hours and no one is checking in to make sure that staff are at their (virtual) desks, but communication processes have been thoughtfully designed to encourage learning. There is also an ability and willingness as a team to slightly shift their roles as needed. During COVID, as new initiatives emerged, some staff have been asked to step up in different ways.

Externally, the Foundation has built strong relationships with others in the philanthropic sector. This has helped them engage more fully with themes raised in internal conversations and translate insights into action by contributing to emerging initiatives. For example, the Foundation has been involved in impact

investing for a few years, and it has reached out to other funders to convene a gathering of Foundation investment managers to share and learn with others. In the context of the pandemic, the Foundation took a similar approach, contributing funds to the emergent Indigenous Peoples Resilience Fund, a national fund launched in June 2020 and governed by an Indigenous Advisory Council with financial support from the philanthropic sector to support Indigenous communities across the country. Contributing to this initiative was an easy sell for the Board in part because Indigenous reconciliation has been a topic of concern for the Foundation, but also because it had built relationships with other trusted partners who were also contributing to this initiative.

In terms of its grant recipients, the Foundation has acknowledged this is an area in which it continues to strive for improvement. In non-pandemic times, convening and a cohort approach to grantmaking were two strategies the Foundation used to develop deeper relationships with grantees to better understand their context and their approach to learning. During COVID, it experimented with other ways to engage with and support grantees, such as through its community-driven pop-up grants.

From a learning perspective, the COVID-19 crisis represented an evolution in how the Foundation thinks about its own culture and how it can be successful and responsive to the communities it supports. Rather than a revolution that dramatically reshaped the Foundation's perception of itself or its values, the crisis has allowed the Foundation to try some new things and provided additional context for broader conversations regarding initiatives it was already thinking about or working toward.

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