

2023  
2024

# Annual Report



# Land Acknowledgement



As a foundation that funds groups throughout the territory called Québec, we recognize the diversity of Indigenous nations who inhabit and protect these lands, including, but not limited to, the Anishinabeg (Algonquin), Atikamekw Nehirowisiwok (Attikamek), Eeyou and Eenou (Cree), Wendat, Ilnu (Innu), Inuit, Kanien'kehà: ka (Mohawk), Mi'gmaq, Naskapi, Wolastoqiyik Wahsipekuk (Maliseet) and W8banakiak (Abenaki).

The Béati Foundation's offices, located in Longueuil and in Tiohtià:ke/Montréal since 2024, are on the unceded ancestral territory of the Kanien'kehà:ka (Mohawk). Tiohtià:ke/Montréal has been a place of gathering and exchange for various Indigenous nations since time immemorial.

We recognize Indigenous peoples as guardians of the lands and waters and respect their past, present, and future connections to these territories. We affirm our intention to work towards respectful and reciprocal relationships with Indigenous peoples, thereby contributing to reconciliation and decolonization.

The Béati Foundation fights against social inequality and systemic exclusion, and recognizes the right to self-determination of Indigenous peoples. We are committed to supporting initiatives that promote the rights, autonomy, and prosperity of Indigenous communities. As a foundation in complicity and in solidarity with Indigenous struggles, we recognize our role in ensuring that the philanthropy of today and tomorrow ensures a redistribution of the wealth accumulated through centuries of colonialism and slavery, with a view to reparation and reconciliation.

*This statement is intended to evolve and is meant as a first step towards weaving deep and lasting ties with Indigenous communities. Above all, this statement is not an end in itself; we know there is much deeper work to be done, and we are committed to honoring it.*

*Last update: Fall 2024*



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# Joint Message from the Chair and Executive Director

Dear collaborators, partners, and friends of the Foundation,

In a world marked by intensifying tensions - whether political, social, or ecological - we are witnessing the rise of conservative and authoritarian currents seeking to tighten inequalities and restrict fundamental rights. These dynamics, on a global and national scale, and even in our most intimate lives, threaten solidarity and exacerbate divisions. Yet, at the heart of this complexity resistance is emerging, local and global initiatives that refuse to yield. This moment demands for rigorous lucidity from us, and action rooted in principles of justice and plurality.

For the Foundation, this era of upheaval has also been a year of profound transformation. As you will discover in this annual report, we have re-examined our practices, our governance, and our major orientations. This collective work, carried out with care and commitment, marks an essential stage in our journey. It is not an end in itself, but a strengthened foundation to move towards horizons where we hope to mark our actions with even more coherence, agility, and impact among the groups and communities we support.

As we look to the future, we imagine it to be fertile with meaning and collaboration. The possibilities that are emerging are both fragile and promising, upheld by courageous alliances and co-creation spaces where the knowledge, experiences, and aspirations of communities take their full place. Only by cultivating these alternatives together will we be able to respond to today's challenges and build a future rooted in justice and emancipation.

It is in this spirit that we continue our commitment, resolved to build with those who are shaping a world where everyone can achieve their full potential.

Yours in solidarity,

*Nadia Duguay,*  
Executive Director

*Tori Hellrung*  
Chair of the Board of Directors



# Highlights

# 01

## **Arrival of Tori Hellrung and Governance Overhaul**

Adoption of a structured governance guide with a clear decision-making matrix to guide processes. Welcoming Tori Hellrung as the new Chair, accompanied with new board members.

## **Strategic Plan 2025-2030**

Collaborative development of the 2025-2030 Strategic Plan with the team, the Board of Directors, and the Selection Committee. Review of mission, vision, and values to better align actions with community needs.

## **Transformation of the Selection Committee**

The Selection Committee now has full decision-making powers on funding and participates in defining the framework for discretionary funds, thus consolidating a more collaborative governance structure.

## **Introduction of Private Impact Investments**

Addition of a new asset class to the investment portfolio: private impact investments. This initiative, led by the Sustainable Finance Committee, supports the implementation of the sustainable finance policy.

## **Implementation of Trust-Based Philanthropy**

Simplification of the call for proposals process, and reduced reporting requirements for funded groups.

## **New Strategic Orientations**

Publication of an exclusion list, definition of ambitious equity targets, and removal of the waiting period for submitting projects, marking key advancements in our practices.

## **Revision of the Contingency Rate Calculation**

Optimization of the contingency rate allows for the funding of eight new groups this year, compared to six previously.

## **Structuring of Shared Resources**

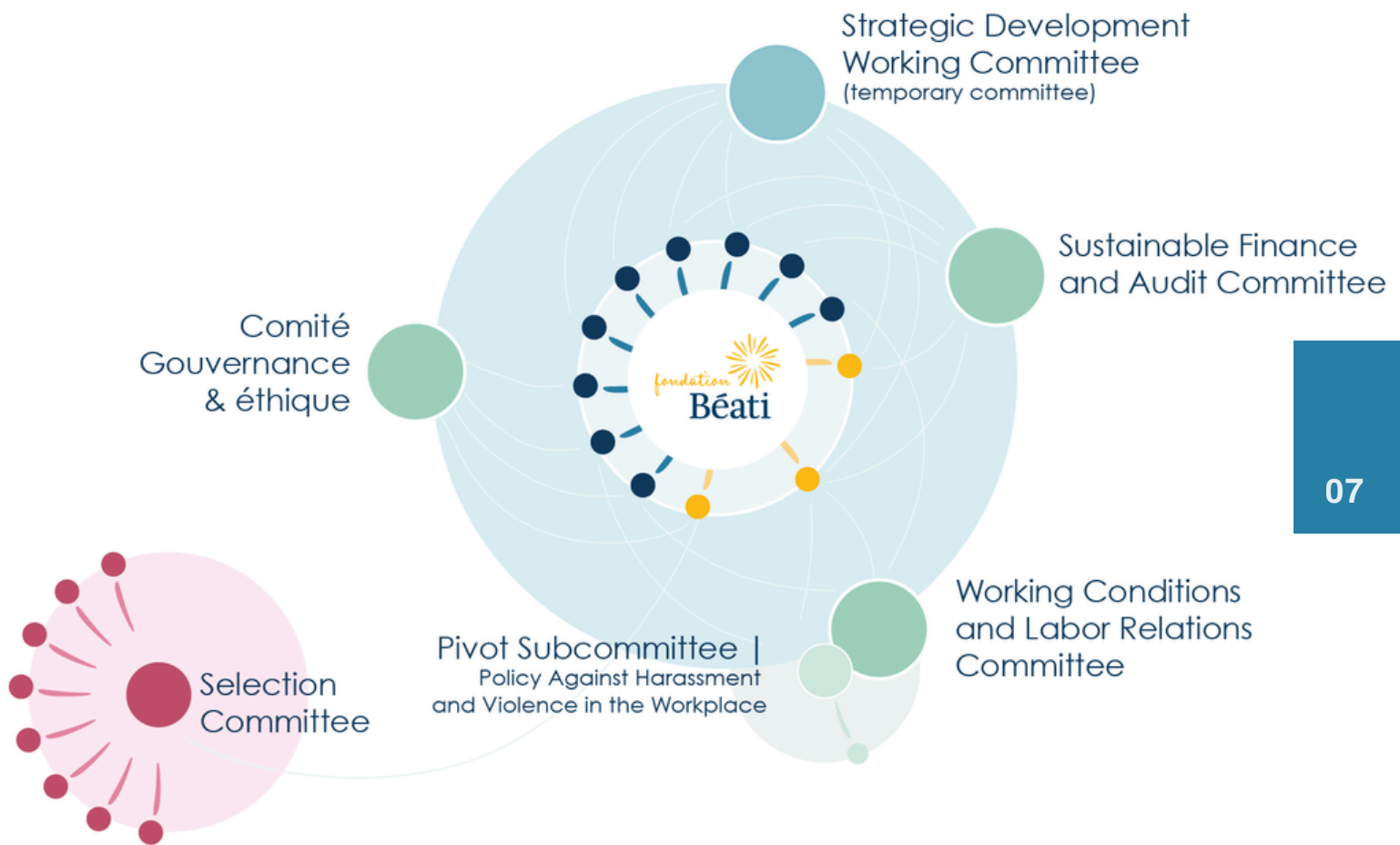
Offering of Philanthropy 101 training and provision of a resource page accessible to all to strengthen the capacities of the groups we support and the stakeholders in the sector.

# 02 Governance and Committees

The year 2023-2024 marked a decisive step in the evolution of the Foundation's governance, as we moved from the theoretical phase to the concrete implementation of a renewed structure. This overhaul, which began with an exhaustive review of internal policies and decision-making processes, took shape with the adoption of new governance tools and the reorganization of different entities. The Foundation's decision-making structure has been clarified, and the Selection Committee now has full decision-making powers, giving it increased autonomy to act without going through the Board of Directors. This structural change not only simplifies processes, but also increases the Foundation's effectiveness and responsiveness in the pursuit of its mission. The appointment of a woman to Board Chair, a symbol of our commitment to more inclusive and equitable representation, has reinforced this transition by consolidating a resolutely modern and collaborative vision.

The year was also marked by a moment of symbolic transition with the departure of Mr. Yvon Monette, a long-standing member of the Board of Directors. After 33 years of exemplary commitment, Mr. Monette was made an honorary member, in recognition of his invaluable contribution to the Foundation. His departure underscored the importance of the values of loyalty and dedication that continue to guide our actions. As the Foundation embarks on this new era of governance, we remain deeply attached to our roots while embracing a dynamic of change and innovation, thereby strengthening our ability to respond to current and future societal challenges.





## Selection Committee

The Selection Committee, independent and central to our governance, is made up of eight members who play a decisive role in the annual funding of projects. The only voting members during the selection process, these members bring a wide range of skills and experience from diverse backgrounds, including experts in social issues, community leaders, and professionals committed to working alongside marginalized communities. This diversity ensures a selection process aligned with our values of justice, equity, and inclusion.

## Committees

The Foundation is structured into several committees to democratize its decision-making processes. It has three standing committees and a temporary working committee, all of which are made up of members of the Board of Directors, the Foundation team and external individuals with complementary skills.

- Governance and Ethics Committee
- Sustainable Finance and Audit Committee
- Working Conditions and Labor Relations Committee
- Strategic Development Working Committee (temporary committee)

## Board of Directors



Our Board of Directors is made up of 9 members from diverse backgrounds, responsible for managing the Foundation and defining its strategic orientations. The mandate of our directors is three years and renewable, allowing for regular rotation, a new feature in our governance.

## Our Team

We celebrated some wonderful news in our team: our philanthropy manager, Rachel Laberge Mallette, welcomed a new member to her family. During this period, Léa Mauchamp was responsible for the first phase of our strategic planning during her six months with us. We then had the pleasure of welcoming Tiffanie Guffroy, who took over with agility and moved projects forward with dynamism. A big thank you to Léa and Tiffanie for their commitment.

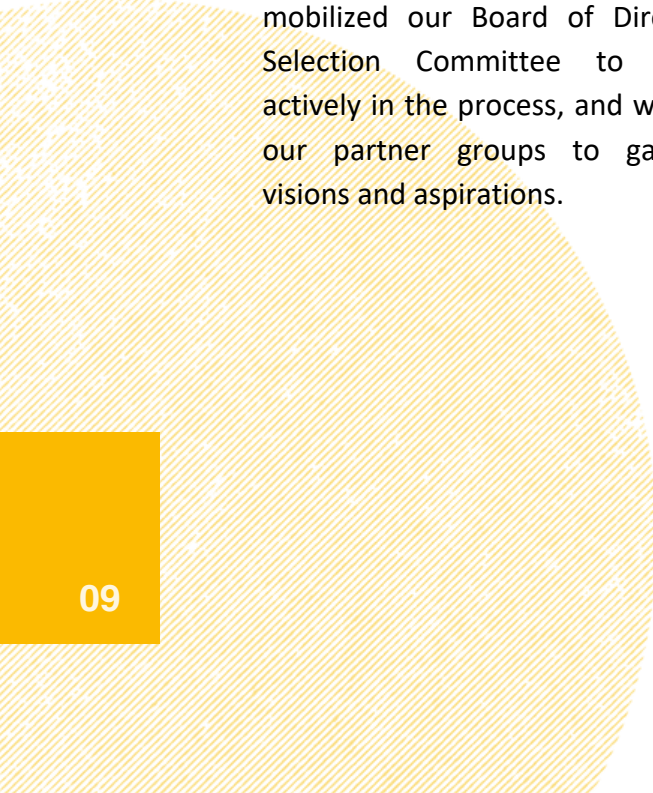






# 03

## Strategic Plan 2025-30



This year, we embarked on a decisive phase in our journey. After a period of restructuring, we began in-depth work to sculpt our Foundation into a genuine lever of support for the groups we stand alongside. For nearly a year, we mobilized our Board of Directors and Selection Committee to participate actively in the process, and we surveyed our partner groups to gather their visions and aspirations.

This long journey has enabled us to establish new frameworks and revisit our foundations, while ensuring that every decision we take respects our commitment to trust-based philanthropy.

# New Fundamentals

## Vision



We aspire to a world imbued with meaning, connections, and solidarity, where justice for all living beings is at the heart of our actions, and where diversities, embraced unconditionally, actively contribute to shaping our visions of the future.

## Mission



Supporting groups in their pursuit of meaning, justice and equity, through engaged, collaborative and courageous philanthropy.

## Ethical Compass

### Four Core Values

- Integrity
- Humility
- Transparency
- Accountability

### Commitments

- Social Justice
- Ecological Justice

### Ethical Principles

- Self-determination of the communities we serve
- Philanthropy centered on the groups we support
- Democracy
- Equity
- Recognition of our positionality



# Towards a Philanthropy of Trust

# 04

In order to focus all our energy on our strategic planning and remain consistent with our thinking, we put our call for projects on pause this year, redistributing funds among the projects already supported. This period of reflection enabled us to deepen and put into practice the principles of trust-based philanthropy, which we actively advocate.

This approach has consolidated our position by providing a structured framework for the actions already in place, thanks to the commitment of those who came before us. By introducing greater flexibility and reversing traditional power dynamics, our partner groups receive greater autonomy.

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## **Give Multi-Year Unrestricted Funding**

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Three-year  
support

Unrestricted

Disbursements detached  
from reporting

## **Doing the Homework**

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Active role of the philanthropy manager in the process:  
note-taking, information gathering.

## **Simplify & Streamline Paperwork**

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Simplified call for projects, letter of  
intent as a first step

Reports conducted through  
dialogue meetings.

## **Be Transparent and Responsive**

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Availability of selection criteria and information on the call  
for projects.

## **Solicit & Act on Feedback**

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Quick turnaround

Seeking solutions to challenges  
experienced by groups

Annual survey

## **Offer Support Beyond the Check**

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Strategic  
support

Philanthropy  
training

Open source  
frameworks and policies

We are seeing the positive effects of this approach: increased flexibility to meet the specific needs of groups, a reduced administrative burden, and better adaptation to the realities of our partners. The results are already visible. For example, several groups that have benefited from three-year funding with Béati are now accessing larger funds, allowing them to begin new phases of their development. The leverage effect, the lessons learned, and the support provided are bearing fruit.

By holding accountable donors and inspiring other stakeholders in the milieu to adopt this model, we contribute to a shared vision of social and environmental well-being. However, trust-based philanthropy also has its challenges. Risks of neo-colonialism, conditional autonomy, and the maintenance of unequal power dynamics persist, particularly for historically marginalized groups. Transparency and accountability must also be balanced to avoid “trustwashing” and ensure genuine authenticity, even though measuring impact remains complex.

Aware of these limitations, we are committed to mitigating them through an ongoing updating of our practices, thus reaffirming our commitment to philanthropy that is true to our values.



**Béati played a decisive role  
in enabling us to expand our  
scope of action.  
The Foundation was the  
spark that ignited  
significant changes.**

**Cédric Dussault**

Coalition of Housing Committees and Tenants Associations  
of Quebec / Regroupement des comités logement et  
associations de locataires du Québec (RCLALQ)





# New Themes | Regular Program



After an in-depth analysis of our organizational, philanthropic and sociopolitical contexts, our Foundation embarked on a collective process to explore the thematic orientations that will guide our funding in the years ahead. This work involved our team, our decision-making bodies, and included reflections on the strengths and limitations of each potential orientation. The aim of this undertaking was to clarify the impact the Foundation would like to have over the next five years.

From this reflection, two fundamental themes emerge: Unconditional Solidarity and Emancipatory Futures. These priorities embody our commitment to building a more just and equitable world. Unconditional Solidarity affirms our support for inclusive and welcoming spaces, where every person can flourish unconditionally. Emancipatory Futures marks our desire to support initiatives that imagine and build liberating futures based on self-determination and collective emancipation. These two orientations complement each other: to build emancipated futures, we need a radically solidarity-based present.

## Unconditional Solidarity

Unconditional Solidarity expresses our commitment to unrestricted inclusion, transforming structures and practices to create environments where everyone feels welcomed and respected. In concrete terms, the Foundation supports organizations and collectives in Quebec that are building spaces for dialogue, exchange, and cultural transformation, aiming for a truly equitable welcome. This solidarity is based on essential values: respect and dignity, physical and emotional safety, listening, accessibility, and the involvement of directly affected people.

## Emancipatory Futures

In this second theme, we aim to encourage visions and practices that challenge current power structures to imagine liberating alternatives. Emancipatory Futures draws on rich and diverse perspectives - Indigenous, decolonial, feminist, anti-capitalist, ecological, and many others. By supporting these perspectives, we aim to propel collective innovation and creative thinking towards a future where justice and equity prevail.

# Ongoing Commitments

2021      2022      2023      2024      2025

Croque ton quartier (tr: Get a Taste of Your Neighborhood)
Aaqsiq Theatre Network / Réseau Théâtre Aaqsiq
Les Butineurs (tr: The Foragers)
Mamie Lisette
Coalition of Housing Committees and Tenants Associations of Quebec / Regroupement des comités logement et associations de locataires du Québec (RCLALQ)
Brique par brique (tr: Brick by Brick)
Front commun pour la transition énergétique (tr: Common Front for the Energy Transition)
Carrefour de participation ressourcement formation (tr: Participation, Resource, and Training Crossroads)
Immigrant Workers Centre / Centre des travailleurs et travailleuses immigrant.e.s

## Les promoteurs de bonne heure de Lac-du-Cerf

Le Collectif de lutte et d'action contre le racisme  
(tr: The Collective for the Struggle and Action Against Racism)

## Tukisivallirutitsanut Parnaitiit

## Migrant Justice Clinic / Clinique pour la justice migrante

Entraide logement Hochelaga-Maisonneuve (tr: Hochelaga-Maisonneuve Housing Mutual Aid)

## La Ferme citoyenne de la Matanie (tr: The Matanie Community Farm)

## La Couverte

## Mikana

## Les ballons intensifs et Defphys sans limite

Le collectif ex-placés DPJ (tr: The Former Child Protection Services Wards Collective)

Dépanneur communautaire de Saint-François-de-Sales (tr: Saint-François-de-Sales Community Support Store)

## Climate Justice Organizing HUB / Le HUB de mobilisation pour la justice climatique

Service de référence en périnatalité pour les femmes immigrantes de Québec  
(tr: Perinatal referral service for immigrant women in Quebec)\*

\*New financing granted thanks  
to partnership with WES Assefa Fund



# Special Projects

In the interests of transparency, the Béati Foundation has structured the use of its discretionary funds, drawing on the expertise of its Selection Committee. These funds are intended to provide flexible, complementary support to our regular donations program, enabling us to finance one-off initiatives, unforeseen emergencies, or innovative projects that meet immediate community needs.

## Guiding Principles

Discretionary funds meet the following criteria:

- Advocacy: Support for projects promoting political and social change.
- Knowledge mobilization: Initiatives strengthening awareness and knowledge sharing.
- Activist care: Actions promoting collective well-being within community struggles.

This framework reflects our commitment to allocate these resources in an equitable, accessible, and agile way, responding to the concrete needs of communities while reducing administrative constraints.

- **Black Communities Housing Society / Société d'habitation des communautés noires:** Development of a strategic plan for the newly formed Black Communities Housing Society of Quebec.
- **Club Ami:** Establishment of a peace forum in the Côte-des-Neiges neighborhood.
- **Gang à Rambrou:** Participation in the PIECD seminar and AIRHM congress.
- **Kenneth Deer:** Participation in the United Nations Human Rights Council meeting in Geneva.

# Real Utopias Micro-Grants

The Patrice Rodriguez Fund / Fonds Patrice Rodriguez (FPR) presents the Real Utopias Micro-Grant, in the amount of \$5,000. It is intended for an individual or collective (non-profit, informal collective, or other) involved in conceptualizing viable alternatives that challenge the status quo and systems of oppression. The Real Utopias Micro-Grant aims to support bold, counter-hegemonic ideas capable of challenging current structures to shape a more equitable and sustainable future.



Individual Category: Mouloud Idir-Djerroud has dedicated his life to building connections around complex issues. He stands out for the significant impact he has on the communities he serves, and for his ability to inspire cultural and systemic change, particularly in the struggle against islamophobia and systemic racism. His dedication to creating alternative solutions perfectly reflects the spirit of this award.

Collective Category: Martin Zibeau and Bruno Garlat aspire to reinvigorate our local economies and revitalize our regions. By experimenting with the implementation of a basic income for local agricultural producers, their project challenges the paradigms of capitalism. It illustrates how an economy can be reorganized to prioritize the financial stability of individuals and collective well-being. This initiative, in which cooperation and solidarity replace competition and capital accumulation, is a source of inspiration for transforming socioeconomic dynamics.





# Towards a Resource Hub

# 05

At the Béati Foundation, support has always been an approach and a mindset. Over the past year, we have been working to formalize this approach by giving it a defined structure, in order to strengthen our support and better meet the needs of our partner groups. This involves a number of experiments, including in-house training courses, the creation of an Open Source resource page featuring over 100 tools for organizations, and ensuring our own policies and procedures are open access.

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## Open Source Resources Page

As part of our support approach, we have created a page dedicated to sharing useful and practical resources. This page brings together a variety of tools, ranging from our internal documents (policies, conceptual frameworks, templates) accessible in Open Source, to a rigorous selection of external tools designed to support group initiatives and projects. By adopting the Open Source philosophy, we facilitate access to documents developed under a Creative Commons license (CC BY-NC-SA), enabling users to adapt them, while retaining their non-commercial use and sharing under the same conditions.

Thanks to a rewarding collaboration with students in Social Innovation Management at HEC Montréal, who helped assess the groups' needs, we have structured a toolkit accessible online containing over 100 downloadable PDFs, accompanied by an Excel sheet that lists each resource, including direct links, descriptions, and the target audience.

## Philanthropy 101 Training

This year, certain groups were also able to attend an internal Philanthropy 101 training. During these workshops, the team explored the world of philanthropy, its advances and limitations, and then addressed financial strategy, offering a space for exchange around the concrete issues experienced by participants in their fundraising efforts. Each session was accompanied by digital tools, enabling groups to better structure and guide their approaches. The success of this first cohort encourages us to plan a second edition in early 2025.

## Developing Resources

As part of our commitment to deepening this support, we will be recruiting a dedicated person whose role will be to further structure this resource hub and explore other forms of support with our groups. This hub, currently under development, aims to provide support that adapts to the evolving needs of our groups.

# Commitments, An Interconnected Approach

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Over the past year, our communications position has evolved to reflect the interconnected approach at the heart of the Béati Foundation. From now on, our communications stance is aligned with this commitment. Our statements are resolutely committed, inspired, and nourished by the communities we support, as well as by the all-too-often heavy silences on certain issues. This commitment manifests itself in all our actions and policies: much more than a set of principles, it translates into clear, political positions, accepted exclusion criteria, investment with clear guidelines, equity targets, and transparent accountability reports.

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## Our Position-Taking Process

Our position-taking process is iterative and evolving, with filters that form an initial basis for our engagement framework, which will be published next year.

We start from three basic conditions that form the foundation of our approach: non-partisanship, respect for group autonomy (non-interference), and alignment with our values. These three fundamental principles guide every position we take.

Next, we apply a filter to identify the issues on which we speak out and the most appropriate means of doing so. This filter is a series of questions about our roots, our relevance, our position, our role, and the actions we plan to take. These reflections help us to assess our legitimacy to intervene on each subject and to determine how to act in line with our values.

Finally, before each publication, we apply what is called “Socrates’ Sieve,” translated into the framework of our values. We check three aspects:

- Truth: We make sure we communicate with transparency and honesty.
- Kindness: Does our position show solidarity with the communities concerned?
- Usefulness: Is this intervention constructive for the cause in question?



# Our Engagement Filters

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## Possible Types of Actions

- Public position-taking: statement, endorsement
- Presence: tables, networks, demonstrations, events
- Discretionary
- Divestment
- Public affairs
- Internal action: policies
- Special project (e.g., Inspirit)

# Our Public Positions

**June 14, 2024**

Endorsement of the Bhayana Family Foundation's call for the creation of a Non-Profit Sector Appreciation Day in Canada.

**May 15, 2024**

Signing of the "Declaration PL57 - A Setback for Rights and Freedoms" (In French) supported by community groups, activists, environmentalists, and trade unionists concerned about the impact of Bill 57.

**May 14, 2024**

Signing of the open letter "An Urgent Invitation to Shift Funding Practices" encouraging funders to shift from traditional philanthropic approaches to transformative practices.

**April 9, 2024**

Statement of support for trans, non-binary, and two-spirit communities. (In French)

**April 2, 2024**

Signing of the declaration for the right of asylum-seeking families to access subsidized childcare in Quebec. (In French)

**March 28, 2024**

Statement and Call for Solidarity with the Centre justice et foi and its workers.

**December 13, 2024**

Statement | Solidarity of the Béati Foundation with public sector workers on strike in Quebec.

**April 17, 2024**

Support for Migrant Rights Network's mobilization for Status for All.

**September 8, 2024**

Signing of the letter "Why philanthropy must mobilize in the face of the media crisis," in response to Bill C-18 regulating digital platforms.

# Commitment to Palestine

## Taking a Stand for Justice and Peace



This year was marked by devastating images of daily violence endured by Palestinians living under occupation, as well as by the courageous individuals defending their rights and freedoms. Faced with this reality, it was unthinkable for our Foundation to remain silent. While Palestinian voices continue to be ignored and made invisible in our institutions and by our representatives, we felt the imperative to call for an immediate ceasefire and an end to the escalation of violence.

We affirm that only a peace rooted in justice and reparation is truly sustainable. This implies respecting international law and guaranteeing the fundamental rights of peoples. As a Foundation, we also recognize our responsibility to invest ethically: our resources must in no way support the armed conflict industry or companies complicit in human rights violations. This year, we strengthened our investment practices to reflect our principles, particularly in the context of the serious human rights violations in Palestine, which, according to United Nations experts, present a high risk of genocide as defined by the Convention on the Prevention and Punishment of the Crime of Genocide.

The Foundation also expresses its support for freedom of expression and the right to demonstrate which are fundamental rights that are increasingly threatened. We believe that constant vigilance is essential to defend these freedoms, which are indispensable for building a just society.

- November 1, 2023 - The Beati Foundation signs this Ceasefire Now appeal, alongside 150 organizations across the country, as part of a social movement involving more than 50 countries.
- December 13, 2023 - Signing of the letter, "A message of solidarity from civil society", calling for peace, a fundamental aspiration we share with all.
- March 18, 2024 - Support for the Coalition URGENCE Palestine in Quebec.
- May 2, 2024 -The Foundation reiterates its commitment as a responsible investor, following the worldwide student mobilizations, notably in front of McGill University.
- July 23, 2024 - Signing of the Coalition Urgence Palestine's letter to the Caisse de dépôt et placement du Québec (CDPQ).



# Partnership With Inspirit

The Béati Foundation has entered into an unprecedented partnership with the Inspirit Foundation to address the issue of Islamophobia and define the role philanthropy can play in supporting affected communities. This partnership aims to develop a philanthropic strategy to combat Islamophobia in Quebec, initiating a change of narrative within the sector. A report, incorporating the perspectives of the communities concerned, scheduled for 2025, will mark a first step intended to catalyze discussions and raise awareness within the philanthropic community on this long-neglected issue.

This type of collaboration embodies the Béati Foundation's vision for partnerships that not only support communities but also actively participate in transforming the sector for greater equity and inclusion.

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## JEDI (Justice, Equity, Diversity, and Inclusion) and the Environment

### Climate Report

This year, the Béati Foundation presents its second report on Canadian philanthropy's engagement with climate change, an effort supported by Philanthropic Foundations Canada (PFC) to mobilize and guide the sector's practices. By integrating JEDI approaches (justice, equity, diversity, and inclusion) and recognizing the profound links between social justice and climate justice, we have included the environmental issue as an interconnected commitment in our five-year strategic planning. This report bears witness to our collective efforts to strengthen our internal practices, establish strategic collaborations, and focus our support on the communities most affected by climate crises, in an ongoing process of listening and learning.

## **Equity Targets**

This year, the Foundation took a new step forward by adopting ambitious equity targets. Noting the persistent underfunding of many communities, we decided to integrate these targets to overcome the unconscious biases that sometimes influence grantmaking. These targets aim to ensure a more equitable approach for our regular donations. We are thus committed to allocating a minimum of 50% of funds to initiatives led by and for underfunded groups, including Indigenous, Black, racialized, LGBTQ2EAI+, religious minority individuals, as well as those with functional limitations or cognitive atypia. In addition, 50% of the funds will be allocated to initiatives located outside major urban centers.

## **Data Collection**

For the past year, the Foundation has been using a socio-demographic survey to assess the diversity, skills, and representativeness of its Board of Directors (BoD), its Selection Committee (SC), and its team, in alignment with our equity targets and JEDI principles. This form helps to build an inclusive and representative BoD and SC of Quebec communities, promoting the redistribution of power and balanced decision-making. A short form is also provided to applicant groups to identify the communities they serve, their composition, and their region of action, thus ensuring the monitoring of equity targets. To promote transparency and in anticipation of Bill S-279, supported by Senator Ratna Omidvar to increase diversity in charitable organizations, an anonymized global overview of this data will be published on our website.

# Sustainable Finance

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# 07



The year highlighted the work of our Sustainable Finance and Audit Committee. The committee successfully implemented our new sustainable finance policy, a strategic milestone for the Foundation. In particular, the committee conducted in-depth interviews with several fund managers, as part of a rigorous process to identify the best partner to manage our private social impact investments. Following these evaluations, the firm Genus was chosen for its expertise in managing investments with positive outcomes, aligned with our vision of promoting tangible social and environmental impact through our financial assets. This choice embodies our commitment to combining financial performance with social responsibility.

Furthermore, extensive work was carried out to revise our disbursement quota calculation. This process led to in-depth internal ethical reflection, addressing issues of economic justice and equity in resource allocation. The revision of this calculation has enabled the adoption of a new methodology that will have the concrete effect of increasing the number of groups supported annually by the Foundation. This advancement demonstrates our commitment to maximizing the effectiveness of our resources while ensuring a fairer and more inclusive distribution of our financial support, in line with our fundamental values of equity and sustainable social impact.



# 08

## Events

### May 22 and 23, 2024

Philab 2024 Summit "Our Legacy for the Future."

Co-host of the roundtable "The Gaps in Philanthropy: What We Don't See."

### April 2, 2024

Transform Capital Peer Group - Presenter, Critical Perspectives on Philanthropy; Reflections and Practical Responses Within Béati.



### November 14 and 15, 2023

Mallet Institute Summit on Philanthropic Culture

"Together For a New Momentum."

Participation on the panel "Renewed Leadership Within Philanthropy."

### "Grief is the first skill to acquire"

Nadia Duguay

On the leadership panel, our Director highlighted the complex challenges of modern philanthropy, emphasizing the importance of developing skills to navigate the dualities of this discipline. In the face of contradictions, tensions, and diverse perspectives, complex thinking becomes essential, enabling us to reflect on philanthropy's positionality and its power relationships, all while assuming its role in addressing inequalities.

This approach is accompanied by a necessity: that of "necessary mourning". This involves abandoning certain illusions, such as self-importance, the idealized image of purely beneficial philanthropy, or nostalgia for a dream world that is now unattainable.

# 09

## Communications and Partnerships



+84%  
subscribers



+19%  
subscribers



+84%  
subscribers

This year, the Foundation adopted an intentional communications approach, aiming to inspire and engage communities by relaying relevant and meaningful messages. We chose to speak out only when we had something substantial to say, focusing on the voices and perspectives of the groups we support. Although the Foundation was busy with internal work related to our five-year strategic planning, our presence on social networks increased significantly. The most impactful communications were those marked by strong statements of position, particularly on subjects surrounded by a marked silence in the sector. This strategy is in line with our commitment to be a lever for social movements and to strengthen our ties with groups fighting for a just and inclusive social transformation.

### Partnership Ecosystem

- Academic: Philab, HEC Montréal
- Philanthropic Networks: Philanthropic Foundations Canada (PFC), Collectif des fondations québécoises contre les inégalités (Collective of Quebec Foundations Against Inequalities), Environment Foundation Canada, New Power Network
- Solidarity Financing: Réseau d'investissement social du Québec (RISQ, Quebec Social Investment Network), Filaction
- Shareholder Engagement and Responsible Investing: Regroupement pour la responsabilité sociale des entreprises (RRSE, Quebec Network for Corporate Social Responsibility)
- Non-profit Partnerships: ROJEP (Réseau Œcuménique Justice, Écologie et Paix / Ecumenical Network for Justice, Ecology and Peace), Collectif des partenaires pour le développement des communautés (Collective of Partners for Community Development), Ligue des droits et libertés (Quebec League for Rights and Freedoms), Réseau mondial des intersections (Global Network of Intersections), Campagne québécoise pour la régularisation et la justice migrante (Quebec Campaign for Regularization and Migrant Justice)
- Solidarity Partners: Sœurs des Saints Cœurs de Jésus et de Marie (Sisters of the Holy Hearts of Jesus and Mary), Sœurs des Saints Noms de Jésus et de Marie (Sisters of the Holy Names of Jesus and Mary), WES Assefa Funds, Inspirit Foundation

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