Leveraging Local Wisdom: The Role of Community Knowledge in the Strategic Direction of BC's Community Foundations

by

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B.A., Political Science
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We acknowledge and respect the Lək̓ʷəŋən (Songhees and Xʷsepsəm/Esquimalt) Peoples on whose territory the university stands, and the Lək̓ʷəŋən and W̱SÁNEĆ Peoples whose historical relationships with the land continue to this day.

Supervisory Committee

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Abstract

Community foundations (CFs) in British Columbia are uniquely positioned as place-based philanthropic institutions whose mandates depend on their ability to understand and act on community knowledge (CK). Yet how senior CF leaders conceptualize CK, access it, and mobilize it through organizational decision-making structures remains under-researched in the Canadian philanthropic literature. Using a constructivist grounded theory methodology, this study conducted ten semi-structured interviews with senior leaders across established BCCFs to examine how CK informs strategic direction and decision-making. The analysis of these interviews produced five categories describing CK's movement through the CK: cultivating informal access, managing multiple knowledge systems, navigating board dynamics, asserting strategic agency, and returning knowledge through reciprocity. Bringing together these categories supports an emerging theory, the Stewardship of Relational Knowledge, which articulates CK mobilization as a cyclical, non-linear process of stewardship conditioned by institutional power. The study concludes that a CF's legitimacy as a community actor is not granted by its endowment size or grant programs but earned through its stewardship of the knowledge entrusted to it by the community.

Keywords: community knowledge mobilization; community foundations; community philanthropy; philanthropic decision-making; philanthropic institutions; British Columbia

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Dedication

To those who believe change in the sector is possible and that it is a worthwhile journey to achieve it.

To those who's shoulders I stand on and who paved the way for me and others to do this work unhindered and unburdened.

And to the communities who spend each day trying to make it better than the last.

Chapter 1: Introduction

Community Foundations (CFs) play an integral role in the development of communities all over the world. From the United Kingdom to China, CFs are emerging as key actors in fostering thriving communities that meet the needs of their residents (Daly, 2008; Deng, 2019). As place-based philanthropic institutions, CFs utilize their resources to lead community initiatives, build community capacity, convene community stakeholders, advocate for local solutions, and steward new donors to grow their monetary resources, all within a specific geographic area (Alaimo & Carman, 2022; Hodgson, 2020a; Meyer et al., 2021; Wang, 2023; Wu, 2021). To enable this work, CFs employ various ways of engaging community members and organizations, collecting and utilizing community knowledge to inform the ways in which a community's needs are being met or not by their work (Farwell & Handy, 2021; McGinnis Johnson, 2016; Stewart, 2017). This research will focus on how CFs in British Columbia conceptualize and use community knowledge to inform their decision-making and strategic direction. While in BC alone, there are well over sixty CFs operating across the province. To further scope this research towards organizations with the conditions for engaging with and leveraging CK, this research draws on Graddy and Morgan's (2006) strategic direction framework to distinguish CFs at different stages of their life cycle. This framework articulates the conditions, qualities, and logics that sustain each strategic stage, highlighting which group would be best to engage for this research. Using the framework this way to inform participant selection ensures consistent, comparable experiences and data collection. Interestingly, community knowledge is not well defined in the Canadian philanthropic sector, but is often referenced as a key pillar in how CFs operate (Pole, 2024). While this research does not seek to define this concept, it will draw on several sources to develop a working definition to support the study's key research questions. Additionally, topics related to community engagement, philanthropic practices, and board dynamics will emerge as part of understanding how CFs internalize and ultimately make use of CK.

Chapter 2: Problem Definition & Context

As their name implies, CFs are regional representations of the communities they operate within. They are public grantmaking charities with funding sources generated through private donations, corporate giving, and government funds. They are considered to be uniquely positioned to address complex community issues as they operate at a hyper-localized level (Graddy & Morgan, 2006). By engaging with their communities, CFs operate from a place of localized expertise and knowledge. As the funding landscape shifts and responds to changing and emerging needs and commitments amidst shrinking governmental support for communities, there is a need to understand how CFs interpret and make sense of CK and how they leverage it to inform their priorities and strategic direction (W. W. Powell & Bromley, 2020). While there are philanthropic practices that support this, for example, participatory grantmaking, democratic philanthropy, and trust-based philanthropy, which offer frameworks for deeper community engagement, they represent a largely front-end approach. There remains a gap in understanding what happens once that engagement ends. Once CK is collected, how is it internally interpreted, legitimized, and used, or not, to inform strategic and other key internal decisions (Hauger, 2023a; Kilmurray, 2015a; Meyer et al., 2021; Wojcik et al., 2020). This research aims to contribute to this gap directly, following the journey of CK from its initial sources in the community through the CF's organizational structures, and surfacing the conditions and strategies that determine whether it influences decision-making processes. This is especially critical as CFs grapple with their colonial histories and practices, which have created inequitable access to funds for marginalized communities and the organizations that serve them (Pereira et al., 2021). Additionally, alongside the rest of the new commitments to reconciliation, social justice, and equity, how CFs represent community needs and knowledge is tied to their ability to fulfill those commitments. Finally, even with their vast resources, a CF's funds are not unlimited; they must make decisions on where to allocate funds, meaning not every community need can be addressed. Who they listen to and how they interpret what they hear ultimately informs the movement of limited philanthropic resources.

Addressing this problem is not as simple as observing how CFs implement community engagement practices. The CFs themselves are as unique as the communities in which they are situated. The understanding and use of CK can also be understood through the CF's strategic stage within its organizational life cycle. Graddy & Morgan's (2006) work on the strategic directions of CFs provides a framework for understanding the CF life cycle, highlighting that CFs operate within a set of assumptions, functions, and strategic outcomes determined by several key variables. This provides a reference point for understanding how CFs prioritize and value community knowledge and operationalize it within their community contexts. Power dynamics between the donor, the board, and the community members actively shape how CFs prioritize CK. A semantic analysis conducted on the mission statements of 1420 CFs by Sloan (2012) highlights how this tension plays out in practice. Most CFs studied use language that signals a blend of donor, community organization, and community interests, emphasizing the competing forces that influence the CF's strategic direction and work. Taken together, these variables shape the conditions under which CK is sought out, interpreted, and used. Yet how CFs navigate these conditions internally, and what determines whether CK is leveraged at all, remained largely unexamined.

It is in this vacuum that this research makes its contributions. As the CF movement continues to grow in Canada and the charitable sector weathers more economic hardships amidst increasing demands, there is an increasing number of community organizations that look to them as sources of stable and accessible funding (Rosado, 2024). A CF's legitimacy as a community actor is earned through the quality of a CF's relationship with the communities it serves and the integrity with which it listens to, interprets, and acts on what communities are sharing. This is not an optics issue, but one of accountability to the community. By examining its internal processes, this research would not only deepen understanding of how CFs internalize CK but also help create pathways for accountability and transparency in CFs' engagement with communities in BC.

2.1 Research Purpose, Question, Scope, and Rationale

This research theorizes the motivations and intentions of a subset of CFs in BC related to how they conceptualize CK, and they use it to inform their decision-making and strategic decisions. It is worth noting that there is no single agreed-upon definition of the concept. There are several ways in which to define *community knowledge*. Community Foundations of Canada (CFC), the national umbrella organization representing Canadian CFs, describes community knowledge as a collection of "…information about trends, assets, and needs … through their broad network of community relationships, the community leaders who volunteer on their boards of directors and committees, and their wide-ranging and open grant proposal process." (Patten & Lyons, 2009, p. 57). From a community-centric perspective, community knowledge is the "…local knowledge … that forms the basis for local-level decision-making in agriculture, health care, food preparation, education, natural resources management, as well as social, economic, and political organization." (Lepore et al., 2024, p. 28). Community knowledge can also be understood to be the building blocks of "information, facts, and data that … includes [the] 'how' and 'know how' – [the] ability, capacity, and understanding to turn knowledge into action." (Rose, 2014, p. 4). Knowledge of bus schedules, library policies, and the results of a citizen engagement process, for example. In all of these definitions, the common thread is that local knowledge is specific to a group and requires relationships and collaboration to be accurately interpreted and validated by others to understand and utilize it. It is in that process that this study is situated, among CFs and the communities in which they serve.

There are several considerations that support the scoping of this study, ensuring the feasibility and capacity of the researcher while still contributing meaningfully to the sector and knowledge base. With well over two hundred CFs operating in Canada with various sizes, levels of resources, numbers of staff, and operating in a diversity of community contexts, this research will focus on a specific subset of CFs in BC that share similar characteristics so that outcomes can be applied to other relevant CFs but not necessarily generalized across the entirety of the sector. Drawing on Graddy and Morgan's (2006) framework to identify specific conditions for readiness to participate meaningfully in this study, participant selection focused on CFs operating at a stage of organizational maturity where community-centric practices were not aspirational but actively underway, ensuring that participants had direct experience with the processes this study is examining. Additionally, any public commitments made to historically marginalized communities, including commitments to the Truth and Reconciliation Calls to Action and the United Nations' Sustainable Development Goals. This characteristic is especially critical as it signals a community-centric direction in their work, which is an ideal condition for answering this research question. Another characteristic would include the region or density type they represent, for example, the CFs on Vancouver Island or urban cores versus rural and remote CFs. There are notable differences in how CFs operate across these settings; a focus on one or the other would likely yield more consistent findings. While knowledge can be studied at several intersections of knowledge generation and production, this study will primarily focus on its interpretation, validation, and use in the CF context.

With this focus in mind, it is worth noting that despite how the research questions imply the separate and distinct nature of contextualization and use, these two dimensions are deeply connected in practice. The literature reviewed and the research design reveal that these two processes are not simply separate stages in a sequential process. Rather, CK can be understood as relational, dynamic, and shaped by multiple, sometimes competing, knowledge systems and actors that CF leaders must navigate in their work. CKs use in decision-making is equally as complex, where it is likely mediated by internal organizational processes, including the translation of informal insights into formal data points, the validation of CK against institutional and board logics, and the governance structures through which decisions are made. In this light, this study examines not only what CK is perceived to be by CFs but also how it is mobilized, interpreted, and filtered as it moves toward the organizations' strategic and decision-making processes.

2.2 Research Questions

This study proposes the following primary question:

- How do CFs in BC conceptualize community knowledge and make use of it to inform their strategic direction and other decision-making processes?

This research question is further supported by the secondary questions through the literature review and analysis of interviews conducted with senior leadership members from BC CFs:

- What internal factors or organizational culture influence their ability to leverage this knowledge?
- Through what processes does the CF validate and legitimize community knowledge for decision-making?
- What sources of community knowledge exist for CFs, and in what ways do they have access to them?

Chapter 3: Literature Review

This literature review explores the evolving role of CFs in meeting the emerging needs of the communities they serve, as well as the approaches and influences that shape their methods. It seeks to define how CK is currently understood by various community actors, how that knowledge is being utilized in the organizations that collect it, and ultimately, the variables that influence that utilization. In this review, I will provide a summary of studies related to this topic and will begin by establishing a typology of community knowledge, distinguishing between western sociological definitions of community and traditional knowledge systems, and differentiating between systemic worldviews and pragmatic, day-to-day activities. The review examines how various engagement frameworks, ranging from participatory grantmaking to trust-based philanthropy, validate or marginalize these forms of knowledge. It also details how forms of power and epistemological injustice contribute to how philanthropic institutions may hold back or ignore certain types of knowledge or community insights. The framing of a CF's organizational life cycle and capacity as conditions for strategic direction and readiness to shift from donor interests to community leadership is also highlighted to identify potential factors that may influence how CFs leverage and conceptualize CK. Finally, the role of boards in the charitable sector offers insight into the potential roles they play within CFs and how these shape the direction of the organization. By bringing these insights together, this review highlights the existing landscape of the literature on CK and its role in CFs. While still emerging, the literature on the specific experiences of Canadian CFs remains limited. The nuanced, contextual ways in which they navigate the use of CK while managing community needs and donor and board interests are apparent and articulated in the closing of this section as a key knowledge gap.

This review relied on the University of Victoria's online library search function, the Foundation Review Journal, the Philanthropist Journal, and the Nonprofit and Voluntary Sector Quarterly to cover a range of topics related to philanthropy, community engagement, and knowledge within the CF context. From the search, a body of literature encompassing journal articles, book chapters, organizational reports, and other webpages from relevant organizations. The search began with the following phrases: "community foundations and decision-making," "community foundations and community knowledge," "Canadian community foundations," "participatory grantmaking," "trust-based philanthropy," and "democratization in community foundations." Which eventually branched out to include "boards in nonprofits," "knowledge production in nonprofits," "local knowledge systems," "informal knowledge systems," and "Indigenous knowledge systems.

To further refine the search, subject terms like "philanthropy," "social science," and "community" were also used. Additionally, publication dates were limited to 2000–2026 to ensure relevance. Additional sources were identified by reviewing the reference lists of the initial sources, thereby expanding the existing literature on the topic.

3.1 Community and Community Knowledge

Community is a term with various dimensions, definitions, and interpretations, ones that continue to ebb and flow with discourse and debate. In the Western context, attempts to define community stem from the work of early sociologists. While offering slightly differing explanations, these early sociologists present their findings of communities as a response to the growing division of labour (Grundmann & Osterloh, 2020). While this longing for connection is a common thread in modern interpretations of community, several key additions deepen our understanding of community and its construction. Cooperation and co-construction are two processes in which individuals act that enforce and establish community with one another. Cooperation refers to the practice of coordinating with others to achieve a shared interest or goal. While co-construction takes that practice and modifies it, negotiating and building new rituals, rules, or culture within the community (Grundmann & Osterloh, 2020). In this light, a community is an end in itself: the act of preserving and sustaining oneself by working and connecting with others who seek the same. This is further enhanced by the members' active participation and sense of obligation to contribute to and maintain its communal structure (Ife, 2016). Finally, one dimension of community that has emerged over the last several decades is online communities. Sharing many characteristics with their real-world counterparts, online communities rely on commonalities and interests to self-organize and build relationships and connections (Ren et al., 2012). Highlighting that longing for connection transcends physical proximity. These definitions surface the complexity of attempting to narrow down a specific definition for community. It is such a contested term in much of the literature that there is no single clear definition, but many.

The literature review revealed several interpretations of the term *community knowledge.* Most prevalent in the context of Indigenous communities worldwide, this definition often refers to traditional knowledge and distinguishes between mainstream and western worldviews and other non-western perspectives (United Nations, 2013). This definition is characterized by its opposition to the mainstream, "distinguish[ing] itself … in its methods of knowledge generation, transmission, and the principles and values related to its use for various purposes." (United Nations, 2013, p. 3). In this context, traditional knowledge is also generalized through its use in decision-making and negotiations, with interrelatedness and holism as key principles. These principles are key features of traditional communities and of the knowledge used to manage local ecosystems, health, and economic development. However, there is some contention over the use of the term 'traditional knowledge'. Onyancha (2024) highlights the interchangeability of several terms in research on the description and definition of local, traditional, and Indigenous knowledge. Their study finds that each term (local, traditional, and Indigenous knowledge) shared similar usage patterns across the social and environmental sciences (Onyancha, 2024). Highlighting that each term was consistently used with little overlap, suggesting that researchers used each term to mean the same type of knowledge, but may still have differing understandings of the other terms. Beyond this, community knowledge is also used to describe the day-to-day needs and interactions of its members, including but not limited to "…technical, ecological, scientific, or medicinal know-how and capabilities … unique to a given group of people in a particular place…" (Beninger & Francis, 2016, p. 185). While the terminology for community knowledge may differ, its function appears to fall within a comparable range. It is knowledge derived from the lived experiences and cultural practices of members in a location, whether physical or online. Additionally, based on the literature reviewed, there are at least two types of community knowledge. One that represents the systemic and philosophical worldview of a community, and another that defines their tangible, pragmatic day-to-day interactions and activities. The types of community knowledge shared are conceptually shapeless on their own but take on the shape of the communities in which they are rooted. As Grundmann and Osterloh (2020) argue, communities are defined not just by their physical boundaries but as a dynamic process of interactions, cooperation, and co-construction. Therefore, the knowledge that they produce is just as fluid and contextual. Regardless of type, community knowledge ebbs and flows alongside the ever-changing membership and boundaries of a community.

Another framing for CK falls into understanding it not only as a product or asset of community but as a process as well. Cornwall and Jewkes (1995) argues that CK is not a static body of insight waiting to be extracted but generated through the interaction between the researcher and the community member. This research frames interaction and participation in research and community engagement as key conditions for the production of CK. Further shaping what it is through the quality of engagement, the terms in which it takes place, who and how it is initiates it, and whose frameworks are used to make sense of what is shared. In this light, CK exists as both an explicit outcome and process, where the conditions of its production matter as much as its content. Cornwall (2008) furthers this argument by focusing on the methods and mindsets that inform the design of participatory approaches. She argues that participation is not a neutral practice, it carries assumptions about who has knowledge worth hearing, in what forms it can be expressed, and who holds the authority to interpret it. This is reinforced through Heron and Reason's (1997) work in participatory inquiry paradigms, where they argue that as individuals, community members are co-producers of knowledge and hold epistemic authority over it. Researchers or in this case CFs, risk producing incorrect or distorted understandings of community life if the knowledge production process treats the community as anything less than an expert in their lived experience. An accurate understanding of CK than depends on the ability of the CF to enter relationships with community in terms that honour their creditability and authority to define what their knowledge means and how it should be used. Trickett and Ryerson-Espino (2004) further breaks down the process of CK through naming the inherently contextual, relational, and partial nature of the knowledge production process. The relationship and power dynamic at play between the community member and listener influences what is generated. Who is in the room, what is safe for them to say, and what institutional logics oversees the exchange all play a role in what is ultimately said. Bringing together these frameworks establishes that CK is not simply a local dataset. It is a form of knowledge that is rooted in lived experiences, cultural rituals and practices, community-defined processes, and ultimately takes on different shapes depending on the relational and institutional conditions of its production.

3.2 Benefits of Community Knowledge

There is agreement by most authors on the importance of a community's contribution to the work and direction of CFs regardless of how and what form the community may be showing up or what form that contribution might make (see Alaimo & Carman, 2022; Farwell & Handy, 2021; Hauger, 2023a; Hodgson, 2020a; Kilmurray, 2015b; MacKenzie, 2021; McGinnis Johnson, 2016; Meyer et al., 2021; Millesen & Martin, 2014; Pearson, 2022; Stewart, 2017). Narrowing in on these perspectives highlights the benefits that community contributions are expected to offer CFs, namely, diverse and intimate, localized insights into community needs that CFs would otherwise not have access to (Kilmurray, 2015b; McGinnis Johnson, 2016; Wojcik et al., 2020). In this exchange, there is a potential for benefit to the community itself: the democratization of philanthropy. Mackenzie (2021) argues that while philanthropy can perpetuate and reinforce existing power dynamics and structures, the participation and integration of community expertise and knowledge may counteract this dynamic. Mackenzie acknowledged that the introduction of community input may be resisted at first, but offers the motivation of donors to give as leverage to push for change. Many donors are motivated to give by what Elster (2011) calls the *warm glow theory*, which states that giving and being recognized for it make donors feel good. By leveraging this, donors can be incentivized to support participatory and democratic models if the *warm glow* is shifted from the act of individual donation to the act of listening and engaging with the community. Additionally, the democratization of philanthropy through community knowledge not only builds community capacity to lead but also encourages a shift in epistemic credibility. CFs have historically relied on expert, professional, or donor insights to inform their decision-making, often excluding community knowledge from the process. Fricker (2007) calls this process hermeneutical marginalization, as it further isolates community experiences and knowledge as ways of understanding need and issues. Instead, professionalized knowledge is prioritized and valued, to the detriment of a community's reality. Made worse by this prioritization is the further discrediting of community knowledge through what Flicker (2007) calls testimonial injustice, in which community knowledge is treated as lesser. By introducing participatory and democratic models to invite community insights, philanthropic organizations can redevelop their understanding of the community's offering to their processes. This reorientation towards community knowledge rebalances epistemic credibility, which has historically been heavily assigned to privileged groups, like donors and funders (Medina, 2013). In this light, community knowledge provides the opportunity to weaken the influence of donors and traditional funding approaches and bring CFs toward a community leadership model.

3.3 Community Knowledge in Philanthropy

The literature review presents several approaches to how community knowledge is valued, leveraged, and validated in philanthropic institutions. Traditional philanthropy is expressed through charitable giving to a community or the broader society. It encompasses the act of donating time, effort, expertise, or money to organizations and individuals that are beyond one's immediate circle (Penner, 2002). This approach represents a conventional donor-community dynamic, where community knowledge is secondary to that of the donor or funder. Participatory grantmaking is an approach that attempts to democratize philanthropy by increasing the level of access and participation of community members, organizations, and practitioners and their knowledge in the grantmaking processes (C. Gibson, 2020). Many of the authors of this approach point to an ethos of *nothing about us without us*, a principle rooted in the disability-rights movements (Evans, 2015; C. M. Gibson, 2018; Paterson, 2019). This ethos is a through line in their articulation of community involvement in a funder's work. While the depth of involvement and the use of community knowledge vary depending on the institution's readiness, this approach shifts the role of community knowledge from the fringes into the organization's grantmaking decision-making processes. This suggests that no one-size-fits-all approach works for participatory grantmaking. Not only would institutional readiness need to be considered, but the capacities and willingness of the community (Hauger, 2023a).

Critiques of participatory methods, however, highlight the performative nature of such approaches (Cornwall & Brock, 2005). Participation may subject community voices to the funders' values, leading community members to self-censor or adapt what they share to protect their relationship with or access to the funder. In this light, "…participation becomes a social process of domination and subjection" (Dula et al., 2026, p. 22). Trust-Based Philanthropy takes participatory approaches and moves the needle even further to situate the community and its knowledge alongside the funder (The 6 Grantmaking Practices of Trust-Based Philanthropy, 2021). As its name suggests, it takes trust and mutual accountability to fold the community's perspectives into philanthropy. By centring the community, this approach interprets community knowledge as inherently valid and sufficient for decision-making. This approach relies on the shifting of control and power from the funder to the community organization and its members, focusing on their lived experiences and expertise to drive local decision-making (Fleming et al., 2024; Salehi & Infante, 2024). By doing so, practitioners of this approach hope to foster mutual accountability between the funder and the community organization, shifting the role of community engagement from institutional compliance to collaboration and relationship-building. This approach saw increased adoption, especially among health-based funders during the pandemic. From their perspective, the approach provided the much-needed flexibility, simplicity, and an equitable power dynamic that were essential for addressing urgent and emerging needs in communities most impacted by the pandemic, as directed by the organization (Azevedo et al., 2022; R. Powell et al., 2023). This approach isn't without its critics; some worry that its implementation is overly simplistic, enacting token measures that don't actually change power dynamics and allowing both the funder and the community organization off the hook (Infante, 2021). Others are worried that the hands-off nature of the approach might perpetuate underperformance in organizations and encourage the misuse of funding (Goldenberg, 2024).

Regardless, this approach appears to be gaining ground as funding organizations seek ways to reimagine their relationship with community organizations (Thredlfall, 2025). Community philanthropy attempts to reframe the funder-donor-community dynamic by positioning all three groups as *donors* in the community development process. Each donor group brings different assets to the table that, when pooled together, build community capacity, power, and engagement (Hodgson & Pond, 2018). By pooling these assets, each group builds ownership and trust in the collective process. This community-forward approach ultimately aims to invite local capacities into the process and invest in them while also reframing philanthropic giving to be inclusive of non-monetary values, such as social capital (Hodgson, 2020b). In this approach, CK is seen not only as valid and central but also as a key cultural and social asset for collective decision-making. However, despite these approaches, the ways CK is valued, acted upon, or resisted are not necessarily determined solely by approach or goodwill. Power, specifically, who holds it and how it is used, also influences the value of CK and how it is ultimately used. Dula et al.'s (2026) review of studies on power in foundations produced a framework for interpreting how power manifests and influences the institution's understanding and use of knowledge. The authors identify four types of power: coercion, where compliance structures and reporting requirements determine what community organizations present and how; manipulation, where agendas and priorities define which issues are considered and which remain out of scope; domination, where privilege and dominate values create a hierarchy of knowledge systems; and subjectification, where community actors internalize, knowingly or not, funder logics as their own (Dula et al., 2026). These 'faces of powers' highlight that even with well-intentioned and designed participatory approaches, CFs would likely reproduce power imbalances by not examining the underlying power structures that inform these approaches.

3.4 Non-Profit Organizational Life Cycles

Organizational life cycle models for non-profits and charitable organizations take many forms. Some are based on for-profit models, favouring financial efficiency and effectiveness as key indicators for determining the stage of life for the organization (Andersson et al., 2016). For example, the six phases of a business life cycle model have been transposed for the non-profit leader to utilize; however, largely missing from this model are the nuances that make the non-profit sector unique from its for-profit counterparts (Santora & Sarros, 2008). Other models are grounded in biology, with key characteristics of linear and sequential growth (Stubbart & Smalley, 1999). The CFs' life cycle is unique in that they largely operate on permanent endowments, meaning a life-cycle model that assumes an end may not be as appropriate. Instead, the literature review provides elements that help identify where CFs might be situated. Andersson et al. (2016) offer a look at organizational life stages through the lens of organizational capacity, arguing that both aspects of a non-profit organization should be considered to produce the best understanding. This perspective offers an understanding of the CF life cycle that is less based on age or time, and more on their capacity to enact or respond to community need. Placing this alongside Graddy and Morgan's (2006) strategic directions of CFs provides a deeper understanding of the various factors that influence how CFs may conceptualize and leverage CK in their work.

3.5 The Role of Boards in Non-Profits

As charitable organizations, CFs operate with boards not dissimilar to those of corporations or businesses, which provide governance oversight and accountability for the organization's vision, amplify the organization's mandate, and set standards for success (Kugel & Mercado, 2024). In the context of CFs, boards have been found to play key roles in the development of new funds and endowments, leveraging their networks to identify new donors, facilitate connections, and grow the CF's funds. Brown and Guo's research identified twelve additional roles beyond fund development, ranging from strategic planning and financial oversight to 'working boards' and knowledge sharing (2010). Interestingly, this research also highlighted that these roles were influenced by organizational and external factors. For example, resource-constrained CFs tend to have boards in fund-development roles. While CFs that worked with complex community needs were likely to have boards play a significant role in strategic planning. (Brown & Chao Guo, 2010). Most of the literature on this topic attempted to analyze the board's role through various theories and frameworks, most notably, agency theory and resource dependency theory (Brown & Chao Guo, 2010; Kugel & Mercado, 2024; Reid & Turbide, 2012). However, these authors also identify limitations of such theories and add others that further describe the inner workings, motivations, and contributions of boards in the CF context. The introduction of group decision, democratic, and stewardship theories by these authors highlights the complexity of boards and the environments in which they operate. While there is agreement that no single theory or framework best describes the role of boards, several authors identify the relationship between the SLT and the board as a key indicator of the board's role and behaviour. Reid and Turbide's (2012) article drew on trust and distrust to describe the governance relationship between board members and senior leadership in changing contexts. They argue that awareness of these paradoxical emotions highlights the dynamic and shifting relationship between the board and the SLT in organizations, normalizing that the expected role and behaviour of board members can ebb and flow in response to organizational factors (2012). Brown and Guo found that the length of the SLT's employment also influenced the roles board members assumed. The longer the tenure, the less likely the board were to take on oversight-oriented roles (2010). In a more critical lens, Chadwick-Coule (2011) questions the board's role and challenges the top-down relationship it has with staff. They argue that conventional linear approaches no longer meet the complex and emergent needs of community organizations; thus, the traditional logics of the boards that govern them would need to evolve as well. In this critical framework, Chadwick-Coule (2011) argues for a pluralistic approach in which the relationship between the board and staff is measured by the effectiveness of their interdependence. This creates an environment in which the board's role is interconnected with the staff's capacities and experiences, leading to potentially more insightful and community-led strategic decision-making.

3.6 Knowledge Gaps

The literature review conducted establishes a comprehensive understanding of how community knowledge is defined, shaped, and interpreted by philanthropic actors. The review offers a loose grounding of what CK can be and how it can benefit the work of CFs. It surfaces several approaches that CFs employ to seek out and invite community insights, while also naming the inherent power dynamics that shape which knowledge systems CFs legitimize and prioritize in these efforts. Other organizational conditions, such as life-stage cycle, internal capacity, and board dynamics, are also identified as influencing how CFs engage with CK. However, several gaps appear to need addressing from this review. First, the participatory approaches, participatory philanthropy and trust-based philanthropy describe *what* community-centred practices should look like; there is a limited understanding of *how* CF actors navigate the processes of these approaches. Specifically, how they collect, validate, and translate CK into formal decision-making spaces. Secondly, although much is shared on the role of the board in non-profit contexts and how various theories and frameworks related to resources, group dynamics, and management can help explain board behaviours. Little was shared about how they may influence boards' prioritization, or lack thereof, of the understanding and use of CK in their decision-making. Finally, the existing literature on Canadian CFs is sparse compared to that of American and international CFs.

Taken together, these gaps reveal the current literature's conceptualization of CK. Across the approaches and frameworks, CK is often treated as a discrete and singular source of truth, something that can be collected by the right processes and applied to decision-making. However, the gaps mentioned above suggest that this framing is missing a key component. CK, as it emerges in the following chapter, is better understood as a composite of lived experiences, relational insights, and contextual awareness that stretches between formal and informal sources. On its own, CK is limited. It requires interpretation and negotiation across differing worldviews and organizational logics before it can be usable. It is the navigation of these processes, the institutional conditions, and power dynamics that the existing literature leaves unexamined and that this study is positioned to address.

Chapter 4: Methodology and Methods

This chapter shares the methodology and methods used to explore how CK is conceptualized and leveraged within BC CFs. The purpose of this chapter is to articulate the research process, data collection methods, and the analysis techniques used to examine this research topic. The chapter begins with an introduction to the constructivist grounded theory methodology, detailing its appropriateness to this research topic and the researcher's insider status in the sector. Followed by the research interview method, the recruitment strategy, and the ethics that guide the overall research project. The data analysis sub-section details how CGT methodology conducts qualitative data analysis, including the coding process, category development and refinement methods, and the memo-writing expected of grounded theory practitioners. The chapter closes with the limitations of this approach, rounding out the methodological tools and methods being used for this research.

4.1 Constructivist Grounded Theory Methodology

A constructivist grounded theory (CGT) methodology was selected for this study for several key reasons. As the study aims to explore the processes behind the interpretation, influence, and leveraging of community knowledge by BC CFs, CGT offered a systematic, iterative inquiry process with participants while also taking into account the authors' reflexivity and experience in the BC philanthropic sector (Mills et al., 2014). Proposed by Kathy Charmaz as an alternative to Glaser and Strauss's classic interpretation of grounded theory, CGT rejects the notion of objectivity and invites an interpretive approach to understanding the world. Instead of a passive and neutral observer, the researcher is considered a part of the study, the data collected, and the analysis produced (Charmaz, 2014). Considering the author's professional background within the philanthropy sector, this approach additionally offers the methodological nuance required to interpret and understand the subtle power dynamics within the CF sector (and the philanthropic sector at large). As an insider, the author brings a familiarity with the sector's institutional logics, relational norms, and awareness of the unspoken implicit power dynamics that exist. This includes the ability to recognize when something is being communicated between the lines, where a participant's careful phrasing signals organizational or community constraints rather than agreement or when a story about board dynamics is also a story of fear and power. In a way, this allows the author to situate what is shared within the sector's specific cultural and political context. It also provides the necessary safeguards to ensure that the researcher's pre-existing professional knowledge and assumptions do not overtake the participants' through constant comparison of data and reflexive memo writing that encourages the researcher to reflect on *why* data is being interpreted a certain way (Charmaz, 2014). Additionally, Charmaz argues that data is not discovered, but rather co-constructed between the researcher and the participant. In this light, the researcher's pre-existing knowledge of the sector provides an opportunity to ask deeper questions that might otherwise be missed (Charmaz, 2014). Most importantly, the CGT methodology differs from the usual qualitative approaches is the construction of a theory as an output. This research topic remains under-theorized, with few relevant bodies of knowledge to draw from. CGT not only offers a framework for constructing a working theory but also draws on the grounded theory work of Glaser and Strauss to ensure it is grounded in the data itself.

4.2 Methods

Charmaz emphasizes that CGT is a flexible framework for qualitative inquiry and "…not [a] methodological [set] of rules, recipes, and requirements." (2014, p. 16). While interviews are a common method, Charmaz argues that the research topic should influence the methods chosen. In this case, semi-structured interviews were conducted with 10 participants holding senior leadership positions across CFs in BC, providing an opportunity to address the research questions while remaining flexible for participants to introduce new ideas or answers or elaborate on their responses. Brinkmann (2016) highlights several contextual factors that make interviews advantageous in CGT qualitative inquiry. While identifying several roles that the interviewer plays, Brinkmann names one of these roles the *participant*. He argues that in this role, the interviewer treats the narratives being shared by the interviewee less as a data report waiting to emerge, but "…as accounts that are coproduced in the situated interaction of the interview…" (2016, p. 529). This aligns directly with CGT's co-constructivist approach to knowledge production, in which knowledge is not simply extracted from the participant but emerges from interactions between researcher and participant (Charmaz, 2014). Drawing on the work of Foley (2012), Brinkmann defines several roles of the interviewee, most relevant in this research context is the *informant*, who is a subject expert chosen to participate for their specialized knowledge or experience. In this case, the tenure and institutional knowledge that participants hold in their roles within CFs allow for a richer understanding of the processes and actions underlying their experiences. Finally, Brinkmann treats the environment of the interview itself, including the participant and the interviewer, as part of the information exchange. He particularly emphasizes the language of the body as inclusive to the co-production of knowledge between participant and interviewer. Though conducted over Zoom, where body language is limited to what the camera can see, the interview recordings allowed for a revisit of specific moments for deeper interpretation. For example, where participants' non-verbal cues, gestures, or tone can be reexamined alongside what is shared, which is consistent with CGT's call for attention on embodied communication. These contextual elements align with and support CGT's core methodological tenets of the semi-structured interview method and mitigate what Morse (2020) identifies as a primary risk of semi-structured interviews: that a researcher's control over the interview can produce shallow, predictable, and inaccurate results. In this light, the participant-researcher role and the flexibility of the interview actively guard against this.

4.3 Recruitment

A roster of potential participants was drawn from the Connect BC website, a public list of CFs in BC. This list was filtered by organizational variables, specifically the number of staff, the organization's age, and the size of the endowment and/or annual grantmaking. Inclusion in the study relied on foundations with similar demographics, which excluded certain foundations from the list, for example, if they were primarily volunteer-led or had smaller or no endowments. This was to ensure that the research topic was relevant to organizations that had the readiness or conditions to explore community knowledge. Smaller or newly established foundations often operate in the early stages of the organizational life cycle, where resources and efforts are allocated to developing relationships with donors and understanding their interests, rather than the engagement efforts to seek and internationalize community knowledge for decision-making. By selecting foundations with established staffing, age, and public commitments to equity, justice, reconciliation, and inclusion, the data collected are comparable and grounded in a shared practice. This selection logic provided the necessary conditions to interview individuals who have engaged with and developed processes to interpret and leverage community knowledge within their organizations.

Individuals holding senior leadership titles (primarily Executive Directors and CEOs) were eventually selected from these organizations based on their tenure and invited to participate in the study. Senior leadership was selected due to their proximity to decision-making and awareness of organizational strategic direction and the processes of developing them. Interviews were conducted on a rolling basis as invitations were accepted and interviews scheduled. Ultimately, 10 participants agreed to be interviewed, with the interviews conducted over Zoom between August and October 2025. The 10 interviews lasted between 40 and 80 minutes and were recorded for transcription purposes and to review body language and non-verbal cues. For example, pauses in discussion, shifting body, and other cues that a transcription may not pick up. In alignment with CGT's co-construction of data, some recordings were used to seek out sensitizing concepts that are communicated through gesture and tone rather than explicit language (Charmaz, 2014). For example, when participants described board dynamics with care, pause, or used intentionally phrased language. This conveyed a sensitive power dynamic and an organizational context that words alone would not fully capture. An interview guide was created to provide some structure for the interview and ensure some consistent responses from participants. Additional buffer time was allotted to allow flexibility and for participants to share and ask the researcher questions.

All participants signed consent forms that detailed the study, the purpose of the interview, the expectation of confidentiality, and the usage of the recordings. Participants were reminded of this at the beginning of the interview and asked again for consent to participate before the Zoom call recording began. To ensure confidentiality, all identifiable information, such as names, organization names, regions, and other demographic information, was removed or replaced before the writing of the findings.

4.4 Ethics

As this study involved human participants, ethics approval was required from the University of Victoria's Human Research Ethics Board (HREB). Approval was received after an application was submitted along with the set of interview questions, a copy of the invitation, a phone follow-up script, and a detailed consent form. While this study was reviewed under the minimal risk category, several considerations are highlighted to ensure ethical alignment. As this research involves organizations likely to share stories and narratives from their communities, who may or may not be marginalized, extra care is taken to ensure that any identifiable information about them is not present in the research findings. Additionally, as the study will involve interpreting and codifying this data, it is critical that the resulting codes do not unintentionally misrepresent or harm either the interviewee or their communities. This will be ensured through careful reflexive memo writing during the coding process, with attention to why a code is selected and whether it accurately represents the process behind the action. As the researcher holds insider status within the philanthropic sector in BC, participants were assured that the researcher was conducting this study in the capacity of an independent student researcher and that no interview data would be used for anything other than the study. The invitations to the participants also assured that accepting, declining, or withdrawing from the study would not affect any existing or future relationships with the researcher. As the use of quotes is common in the CGT methodology, special attention will also be given to how they are presented and how removing identifiable information can achieve both anonymity and an accurate representation of what was shared. In cases where either is not possible, the quote was simply not used. Finally, a copy of the researcher's Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans CORE 2022 certificate of completion was included, in accordance with the new ethical guidelines. The study received HREB approval in June 2025 – see Appendix.

4.5 Data Analysis

The interview data were transcribed from the recordings and fed into the qualitative analysis software, *Nvivo,* to organize and assist in the coding and analysis. Following the CGT approach, the interviews were initially open-coded line by line. Ensuring that even the tiniest detail is detectable and coded to a specific action or process. Breaking up coding into smaller pieces also discourages the researcher from superimposing "…their preconceived notions onto the data." (Charmaz, 2014, p. 125). As part of the initial coding, memo writing was also used to document the researcher's reflections, emerging questions, and potential preconceptions. This initial coding stage yielded over 800 codes across the 10 interviews. Included here is a non-exhaustive sample list of initial codes.

- Describing Limitations of CK
- Connecting with External Expertise
- Grounding Lived Experiences with Data
- Highlighting the Benefits of Formal Data
- Identifying Sources of CK
- Listening to the Complexity of Community Needs
- Triangulating CK with other Knowledge
- Unlearning Colonial Ways of Knowing and Thinking

The next step was to take the initial codes and narrow them into focused codes. During this step, initial codes were reviewed and organized by spread, frequency, and their explanatory power for processes related to community knowledge. Charmaz calls this shift from the initial to focus coding a move from fragmentation to conceptualization (Charmaz, 2014). Part of this process also involved a constant comparison of initial codes across interviews. Not only were those appearing consistently selected, but those that highlighted patterns across community contexts were as well. In the end, 11 focused codes were selected from this process. Included here is a sample of the 11 focused codes:

- Asserting Strategic Direction and Agency
- Managing Multiple Knowledge Systems and Sources
- Confronting the Insufficiency of Conventional Grantmaking
- Negotiating the Boundaries of Community Initiatives

Finally, these focused codes were refined as they were reapplied to the interviews through incident coding. This involved coding larger segments of the interview data and constantly comparing how codes differed or were similar across interviews. From eleven, five of these focused codes were refined into five categories. The exclusion of the other six codes was determined using theoretical sensitivity. Charmaz defines this process as "…seeing possibilities, establishing connections, and asking questions." (2014, p. 244). In reviewing and comparing each of the eleven focus codes, subtle nudges emerged, indicating that some no longer made logical sense to include. For example, the focus code *Navigating Donor-Imposed Restrictions on Funding*, while potentially important for understanding how it may influence organizational dynamics, showed few meaningful connections to the other focus codes. While *Navigating Board Expectations and Dynamics* revealed strong relationships and dependencies to other focus codes, for example, to *Asserting Strategic Direction and Agency,* where participants shared their responses and approaches to board dynamics. It also benefited the coding process by using gerunds to code each stage of data, placing the action at the focus of the research. This encouraged making connections and seeing pathways and processes between focus codes, which reinforced the practice of theoretical sensitivity. Alongside these connections, focus codes were also examined for their capacity to carry meaning and framing of the process being analyzed. For example, the focus code, *Cultivating Informal Process for Knowledge Mobilization,* included a range of participants' experiences of designing informality into their work. It also threads together the emerging theory as a key process for how CFs invited community insights and showed up consistently across interviews and experiences. Thus, this and four other focus codes were elevated into category status, where their properties were further expanded and described to form the initial stages of the emerging theory.

Memo writing is a critical part of CGT, integrating the researcher's perspectives and reflections into the co-construction process of data. Charmaz emphasizes the need for memo writing to record comparison data and the researcher's reflections, and to bridge the initial and focus codes. The memos supported the iterative process of comparing codes and narrowing the eight hundred initial codes to eleven focused ones. It also supported the researcher's self-questioning about when data shared could be interpreted through their own insider experiences rather than the participants'. This practice, when done intentionally and introspectively, also provided clarity on how the coding process and the resulting categories were interconnected and grounded in participants' shared experiences. While Charmaz encourages memo writing at every stage of data analysis, the researcher also employed this practice spontaneously as ideas or patterns emerged throughout data collection and analysis.

Finally, consistent with CGT's constructivist approach, the findings and discussion are presented as an integrated whole throughout Chapter 6. In CGT, the categories produced through initial and focused coding are themselves constructions. They are not simply retellings of participants' experiences by a neutral observer, requiring a separate interpretation. Rather, the researcher's role in constructing the categories and interacting with the data, giving it meaning, is what gives CGT its analytical power (Charmaz, 2014). Presenting the discussion embedded within each category, therefore, reflects the co-constructed nature of this methodology rather than a departure from conventional thesis structure.

4.6 Reliability and Validity in Constructivist Grounded Theory

As Charmaz argues, the output of this approach makes sense to the researcher through their participation in the analysis and data collection (Charmaz, 2014). Most readers of this study will likely judge its worthiness, reliability, and validity by the methods used. In this light, Charmaz emphasizes theoretical saturation as the source of credibility in CGT. In theoretical saturation, data are considered sufficient and valid when they provide a deep perspective on the research topic and bridge the data and findings. While the initial coding phase was expansive and produced over eight hundred initial codes, later interviews confirmed and refined existing groupings of those codes. For example, codes related to board dynamics and knowledge management were used more frequently and became more saturated as interviews progressed. This signaled that the processes represented in those codes were well defined at this point. At that stage, further interviews would likely produce redundant data within the context of the emerging theory. This process of initial coding and the eventual focused codes, with reflective memo writing in between, increases the validity of the data collected, ensuring the coding reflects the processes put forth by the participant. Reliability in CGT relies on intensive memo writing during data collection, coding, and analysis. Memo writing serves several purposes related to reliability. As the researcher's professional background is in the sector being researched, the memos serve as guardrails against professional assumptions about the participants' narratives. By documenting and reflecting on participants' narratives during the coding process, the memo becomes a space for the researcher to critically reflect and question their own influence and assumptions. In turn, this produces an audit trail that highlights the methodological journey from data collection to theory development.

4.7 Limitations

Grounded theory and its variant approaches benefit research that seeks to understand processes and develop a working theory around a specific phenomenon. In most cases, this methodology asks the researcher to seek validation and insights from various stakeholders to understand the phenomenon from different vantage points. In this case, this study seeks to understand the CK process from the perspective of the CF, which limits the generalizability of the findings to other community groups that also collect and leverage CK in their work. Additionally, the diversity of BC CFs means that even with similar organizational characteristics, findings may vary depending on leadership, board dynamics, and specific community contexts. In this light, caution should be exercised when translating this study to other funding organizations or community contexts.

Additionally, the researcher's role within the sector poses both a potential strength and a limitation to this study. As an insider, navigating philanthropic terminology, logic, and dynamics comes easily. Allowing the research to be unhindered by an extra layer of interpretation and understanding. However, this insider status also poses a risk, as participants, unable to avoid seeing the researcher as a peer, may hide or downplay certain aspects of their experiences. Whether to avoid exposure or the fear of punishment, this can limit the depth and range of data collected. While every effort is made to ensure safety and anonymity during the interview, the philanthropic sector in BC is small and well-connected. Even the most tenured participants may feel the need to reshape the stories about their experiences to ensure anonymity.

Chapter 5: Positionality Statement

As the author and researcher of this study, I bring various lenses and logics that influence how I conduct and approach this research. As a racialized individual belonging to the LGBTQISA2+ community born to immigrant parents, I experience the world through a spectrum of privilege, power, and oppression. My education and maleness have afforded me certain access and authority to power and knowledge, while my racialized and queer identities have provided me the privilege of seeing and articulating how power shifts and changes the relationships and interactions, whether negatively or positively, that I experience in social and political environments. These two dualities have heightened my awareness of how I, as an individual, am perceived by others in situations where my identities and experiences may be seen as a power over them. I bring this awareness into my work as the current Director of Evaluation at the Vancouver Foundation, a position and organization that name alone often creates power over others. As one of the largest community foundations in the country, there are few community organizations that have not heard of my employer. I have experienced how this label affects others' perception of me in both the non-profit community and the philanthropic sector. These experiences have given me connections and knowledge systems I might otherwise not have access to, lending me a sort of legitimacy and authority over my work in the sector. At the same time, I lean on my reflective practice as someone who holds such positional power to ensure that I enter new community relationships and spaces with humility, curiosity, and clarity. Ensuring that I always maintain clear lines between being a researcher, an evaluator, and a VF employee. Additionally, as someone based on the unceded and ancestral territories of the hən̓q̓əmin̓əm̓ and Sḵwx̱wú7mesh peoples, colonially known as Burnaby, my lived experiences are largely urban. Growing up, I had access to my cultural foods, language, and traditions, and I regularly saw people who looked like me in my community. This study brought me into rural and remote community contexts, where I have only a distant understanding of what community life might look like. I again rely on my reflexive practice to check my positionality and come into those experiences with openness and curiosity. Finally, my motivation for this study is directly related to my experiences at the Vancouver Foundation. My interactions with donors, grantees, community organizations, other funders, government actors, and community leaders through my work are fundamental to my understanding of the sector. Layering this experience with my community development coursework and cohort interactions has enriched how I show up as both an insider and an outsider community practitioner and researcher in this study of the BC CF sector.

Chapter 6: Findings & Discussions

This chapter presents the findings from the semi-structured interviews conducted with senior leadership team (SLT) members from 10 BCCFs. In alignment with CGT, these findings are not simply discovered facts or narratives, but rather a constructed set of data between the interview participants' experiences and the researcher's interpretation. As a researcher and professional within the philanthropic sector, reflexive memo writing was utilized as part of the data collection process. Ensuring that the findings are grounded in participants' experiences while acknowledging the influence of my current position and sector experience as an employee at a BCCF.

The findings are organized into five categories that have emerged through iterative cycles of initial and focused coding. Each category includes a set of properties that highlight the range of processes within it. These are further defined by detailing the conditions under which they appear, the strategies enacted in response to those conditions, and the resulting outcomes. A discussion section follows each set of findings, situating each category within the literature and examining how each one contributes to the research questions posed at the beginning of this thesis.

Table 1. *Breakdown of Categories and their Properties*

Category	Properties
1) Cultivating Informal Processes for Knowledge Mobilization	- Relational Ties - Designed Informality and Convening - Informal Knowledge Translation
2) Managing Multiple Knowledge Systems and Sources	- Assigning Credibility to Sources - Translating Between Worldviews & Belief Systems - Finding Patterns and Similarities - Management of Access
3) Navigating Board Dynamics and Expectations	- Board Risk Tolerance - Governance & Operations Tension - Board Composition & Learning - Negotiating Discomfort & Resistance
4) Asserting Strategic Direction & Agency	- Shifting Organizational Culture - Leveraging Positional Power - Navigating Friction - Strategic Risk Taking
5) Mobilizing Community Knowledge for Community Reciprocity	- Playing the Role of Community Connector - Closing Feedback Loops Through Knowledge Packaging and Dissemination - Stewardship and Selective Circulation of Knowledge

While the findings are presented as a set of process-oriented categories and properties, they collectively respond directly to the research questions of how CFs conceptualize and use CK. Across interviews, participants' accounts do not describe CK as a static or singular truth; rather, they consistently understood it as relational, context-dependent, and emergent through interactions across multiple knowledge systems and actors. Similarly, its use in decision-making was not described as a linear path, but as a carefully navigated and mediated process shaped by organizational culture, structures, board dynamics, and internal acts of translation and validation. The categories that follow, therefore, paint a picture of not only how CK moves through the CF but also how it is understood and ultimately made usable within it.

6.1 Cultivating Informal Process for Knowledge Mobilization

Whether in the process of, or established after many years in their role or community, participants highlighted deep, long-term, and wide personal connections to their community's various actors and leaders that make informal CK flow possible. This section highlights the relational ties necessary for knowledge to exchange hands between CFs, organizations, and other actors. This includes purposely designed for informality, acknowledging that formal processes often filter (whether intentional or not) certain types of knowledge and insights. The cultivation process includes not only who participants engage with and how, but also how they translate that informal knowledge into the CF's formal channels.

6.1.1 Relational Ties

Many participants identified organizational size as a condition for building relationships. They described a happy medium effect where their size was sufficient enough to provide the necessary capacity for community engagement, yet remained intimate enough to foster authentic and trusted relationships. Many participants shared that the length of time they've been in the community and in their senior leadership role at the CF contributed to their ability to connect with and solicit knowledge from the community. By virtue of time, some participants felt that they had saturated the "who's who" in the community, which gave them time and resources to focus on building trust. A few participants also pointed to their organizational culture as enabling them to build relationships in the community, whether by participating in community gatherings and networks or by fostering listening through the values of humility and learning.

> "I think that the people that we have here are a big part of it. And everyone in our staff team is really committed to learning and being open to what we can find out from the community. We don't have anyone here that thinks they're an expert in anything really. They're are experts like they're really high performing in their roles, all of them, but, but they also very good listeners. And that's part of kind of their personality. So, that's part of it. But then another thing that is more just a lucky circumstance is, I think we're at a size where we can dig in. And there isn't a player in my region that I don't know. Right. And that means something, right? That there is value in that. And then, possibly another factor is stability. That creates trust, and it creates and it opens doors, you know," (P2)

To maintain relationships with their communities, participants describe their efforts to sustain everyday relationship work as a key strategy for staying connected to informal channels of knowledge. Instead of treating CK as something to collect only through formal consultations, they discussed connecting directly through trusted relationships, using informal conversations to test emerging insights, and relying on staff presence across multiple community spaces to keep information flowing. In some cases, participants mentioned intentionally attending sector tables and community network events, using their participation to contextualize what they already know, learn what they don't, and connect the dots across emerging trends. As one participant described:

> “Yeah, we try to hold open houses in community several times a year. And so yeah, that's just a more open way of sort of checking the pulse of a community. And then yeah, I think relationships as well, just like ongoing relationships are a way of being in touch with community knowledge and priorities. […] we know where people are hanging out. So we try to really populate those spots and coffee shops. And then we try to make presentations at different network tables, the chief and council, and the municipal council. And then we try to host table conversations on like topics that are important and timely. Try to get the right people in the room to talk about the data and share their experience, and to see what kind of actions can come out of those conversations.”

These relational strategies produce a consistent pulse check for the CFs, which is more regular than episodic, because knowledge is shared through ongoing contact rather than only at set points of the granting cycle. They also deepen trust, making it more likely that organizations share critical details and concerns earlier and share realities they might not put into writing. At the same time, there is a risk that the knowledge base becomes concentrated in particular networks and individuals if the circle of engagement is not intentionally and continuously expanded. This also introduces an organizational bottleneck, in which the CF’s ability to invite knowledge is limited by the staff’s capacity to engage, listen, and interpret. When informal knowledge depends on who you know, your access to them, and how long you have been present, knowledge management becomes more than just an operational responsibility, but a social one as well.

6.1.2 Designed Informality and Convening

Participants repeatedly shared the limitations of formal avenues, like grant applications, in fully representing the needs of the community and that CFs will likely miss emerging needs if they only rely on who applies to their grants or fills out their feedback surveys. This creates a condition where “waiting for people to come to you” is seen as insufficient for engagement, particularly for the CFs who want to hear from a wider mix of community organizations, leaders, and members. Participants also describe a desire for formats that feel safe, accessible, and not overly bureaucratic, especially for people who may be unsure about approaching a funder. As one of the participants stated:

> ”So yeah, it is organizations that bring the needs that they see in their work to us to ask for funding. So you know, there is a bit of relying on what they're bringing forward, you know, we can think food security is a really big deal. But if nobody that's doing food security apply for a grant that year, we're not granting to that. So it is a little tricky, like it isn't always directly like we might see a need, but we actually might not fund that need in that year, because it is really dependent on the organization coming to us with a funding request. […] I do think that piece about outreach and asking, so inviting people in, not just waiting for people to come to you. So I do think that's really important, like, you know, creating safe opportunities for people to talk about what's going on, um, will give you more information than just grant requests will.” (P5)

Many participants, like P5, describe actively designing informal touchpoints, both one-to-one and group-based, that lower the barriers for knowledge sharing. These include inviting unfamiliar or new organizations for a “cup of tea,” making a point of meeting people at least once, holding open houses several times a year, and hosting community forums or roundtables that draw people out of their sector silos. Some strategies are more explicitly social and introductory, cross-sector introductions, or informal coffees, where connections can be built and knowledge sources identified. Others are intentionally creative and deepen relationships, such as presentations and speed-dating events, to make information sharing relational, approachable, and multi-directional. In P9's case, they highlighted their motivation for creating such opportunities in their community for not only other community organizations and its members, but also potential donors:

> "Well, storytelling is the gateway to relationships and building relationships and trust with folks that can be generous will create a stronger philanthropic environment and culture, if you will, in our community. And so I am driven to just amplify that philanthropic culture and really create the safety around it and show folks who have extra just how much fun it could be." (P9)

Designed informality increases participation in knowledge sharing, including organizations that may not yet be grant-ready or that are hesitant to frame their needs through grantmaking. It also produces ripple effects: convening becomes a form of knowledge mobilization in itself, as CFs gather information and connect organizations when overlapping needs and interests emerge. The informality also increases the CF's perceived approachability and legitimizes its role in the community. However, these formats can generate more qualitative information than a CF is designed to capture, store, and feed into its formal decision-making processes, creating a gap between what is heard and what becomes actionable internally. This disconnect risks these informal engagements being perceived as extractive by the community. When a CF collects rich, lived-experience data but fails to demonstrate how that information informs its decisions, the engagement shifts from relational to transactional.

6.1.3 Informal Knowledge Translation

Informal processes can only shape strategy when what is heard or shared can travel into formal decision-making spaces. Several participants named their organization's internal culture as setting the stage for informal knowledge translation. By framing community engagement as a function of community learning, staff are prompted to enter community relationships to listen and foster understanding. This framing creates the conditions for informal conversations that become genuinely informative, where staff are "out there listening to people," CF leaders can, in turn, listen to staff as a source of CK, and the insights can be disseminated across the organization. Participants also described their sustained relational presence, building and maintaining ongoing personal relationships with other community actors in low-barrier, highly informal settings. For example, going for coffee, a drop-in visit, or a monthly network gathering.

> "Working relationships with other organizations, just getting together for coffee, traveling around [the region] to meet with groups […] And actually getting out there, meeting with people, building that social capital around the community. Um, primarily, um, build reputation, good will for the foundation, by doing what we said we were doing, following through being there, showing up, like doing all those things that you need to do to establish relationships. Right. Longer term goal of, okay, we've, you know, we're, we're a trusted partner. We're, um, we're a known entity. We're, you know, we're well respected in the community. We have these, you know, broadly good relationships." (P8)

Several strategies emerged from the participants when translating informal conversations into usable organizational knowledge. One approach was to take what was heard across the community directly into formal spaces like strategic planning sessions, using the accumulated weight of these conversations to situate the board's understanding of the community's needs. Some participants took it even further, preparing their boards and actively creating a safe environment, and inviting community voices into their board meetings so that members could hear first-hand the communities' realities. Participants also described hosting and facilitating community gatherings in which the space design and agenda encouraged openness and sharing of the issues they're facing. In these cases, participants also convened groups or organizations that might benefit from connecting. In this light, the translation role takes on a connective element.

> "I do think that piece about outreach and asking, so inviting people in, not just waiting for people to come to you. So I do think that's really important, like, you know, creating safe opportunities for people to talk about what's going on, um, will give you more information than just grant requests will." (P5)

> "And then we try to host [community] conversations on like topics that are important and timely. Try to get the right people in the room to talk about the data and share their experience, and to see what kind of actions can come out of those conversations." (P10)

These strategies make informal knowledge accessible and discussable inside CFs, turning community conversations into narratives, priorities, trends, and action that boards and staff can interact with and engage with. They also position CF staff as interpreters, what they select, synthesize, and connect shapes what counts as CK at the decision-making level, which means that the quality and depth of the translation process have consequences for whose knowledge reaches the decision-makers. At the same time, participants highlight that the shared knowledge generated by this process extends beyond the CF, prompting community actors to connect, form new partnerships, and collectively address needs that no single actor could address alone.

> "So trying to just use our community knowledge to also just like bolster and support others to take the lead on some of those things. Like [local charity] really are working so strongly in housing. And what's come out of that is these, like we're meeting every couple of months and there's about 12 to 15 individuals or organizations that come out and they're the whole gamut of people that are involved in any kind of housing. And it's interesting while watching it flow, but it's, yeah, it's sharing that community knowledge that is really helping. People are getting housing that they hadn't connected with. People are meeting each other who hadn't connected. Um, so I could see that even on a bigger scale, like across the sector, like that seems like a lot, but I feel like there could even be more of that. I think that we're often really in our own, um, missions like kind of is stuck in our own work day to day because it's busy and people don't have enough time. I get why, but it's, um, it's been an interesting piece that's kind of opened up bigger conversations." (P5)

6.1.4 Discussion: From Informal Processes to Knowledge Systems

The findings in 6.1 illustrate that informal processes for knowledge mobilization in BC CFs do not just emerge from structured programs or policies alone, but from an accumulated practice of relational presence, intentional design, and interpretive labour. This discussion situates those findings within the existing literature to highlight how this category contributes to our understanding of how CF's access, collect, and begin to use CK. While also connecting it to the challenges that CFs face when brought into their formal internal processes.

The relational processes described by participants align with what Ife (2016) and Grundmann and Osterloh (2020) identify as the co-construction at the heart of community life: knowledge is not simply extracted from communities but generated through sustained active participation in community processes and rituals. What some participants described as a "lucky circumstance" of time and stability for engagement is, in fact, a necessary condition for avoiding what Fricker (2007) calls "testimonial injustice", in which powerful institutions position themselves as superior knowers. By framing their engagements as learning and listening rather than extraction, participants enact a curiosity-forward mindset that can partially address this injustice and avoid or at least mitigate power imbalances. In this sense, the cultivation of informal processes is not simply an engagement practice but also an epistemic one, in which the outcomes determine whose knowledge enters and informs the organization's decision-making.

The designed informality described in 6.1 speaks directly to concerns raised in the participatory and trust-based philanthropy literature regarding power asymmetry among funders, donors, and the community. Gibson (2020) argues that formal grantmaking processes structurally benefit organizations that are already known to funders; they likely understand the funder's institutional language, are able to navigate its bureaucracy, and are well-networked in the sector. Participants' intentional efforts to lower barriers to connection through highly informal opportunities, such as cups of tea, cross-sector tables, and open houses, reflect the ethos of *nothing about us without us* in practice, even when participants don't use that language explicitly (Evans, 2015). However, the findings also expose a tension that participatory funding models don't fully address: designing for informality generates an incredible amount of qualitative data that formal organizational structures are not equipped to process. When knowledge gained through these informal opportunities does not demonstrably and transparently shape decisions or strategies, the CF can be seen as extractive rather than reciprocal to the community. This tension exists for many CFs in cases where knowledge is largely neatly packaged, professionalized, and sanitized for board consumption, which often removes or softens the appeal that the community had initial shared. However, participants have described stepping into this messy space between informal knowledge generation and formal decision-making processes to operationalize CK while ensuring its integrity through various strategies.

The informal knowledge translation practices described by participants in 6.1 advance what the literature shared on CK inclusion. The current literature focuses on *whether* community voices are included; participants, instead, described *how* that inclusion is operationalized through interpretive and connective practices. In carrying informal conversations and discussions into strategic planning sessions, synthesizing themes across community tables, and convening organizations that don't often meet, CFs perform a form of CK brokering, positioning the institution as a bridge between diverse community experiences and organizational know-how. This position, however, also introduces what Medina (2013) would recognize as increasing the CF's epistemic authority, where the institution (and its staff) role in translating CK made them the sole decider of what counts as significant, whose narratives are credible, and which experiences and insights are worth operationalizing. Given that this category describes the first step in how CK is accessed and framed, this stage is crucial to what becomes known to the board and decision-makers at the organization. The community's epistemic agency in shaping how their insights are heard ultimately informs what will likely become strategy or policy at the CF.

When brought together, these properties in 6.1 describe the beginnings of a larger process through which CK is stewarded from community sources into the CF's decision-making processes. Relational ties generate access, designed informality widens and invites participation, and informal knowledge translation begins to convert diverse CK into organizational inputs. However, what participants have described so far is not yet a full theory; it is a set of siloed practices that are dependent on an individual's skill and capacity, the organization's culture, and the board's interest in community-centred approaches. The following section, 6.2 Managing Multiple Knowledge Systems and Sources, describes the participants' challenges in operationalizing informal knowledge, specifically how to assign credibility to multiple, sometimes competing, sources of CK, how to translate across polarized knowledge worldviews and belief systems, and how to manage the access points through which CK enters the CF without reproducing the exclusion that the informal processes were meant to address.

6.2 Managing Multiple Knowledge Systems and Sources

This section highlights the participants' experiences managing the multitude of knowledge systems that they have access to through their work as CF staff. The properties that emerge in this category reveal the interpersonal labour that participants engaged in to ensure that the management of knowledge systems and sources reflects the reality of the community's experience. This interplay among their introspection, translation, and pattern recognition abilities in managing these systems and sources, whether direct or indirect, increases the connection between the community and internal decision-makers at the CF. For some, these connections meant a softening of traditional Board perspectives and approaches, while others noted the challenges of capacity in enacting this process, which led to the exclusion of harder-to-reach knowledge systems.

6.2.1 Assigning credibility to sources

The participants interviewed described a range of knowledge sources they drew from for their work, including grant applications, feedback surveys, census data, city reports, community gatherings, and conversations. Under conditions of budget and capacity constraints for primary research, formal sources, like the census or city reports, are often the baseline source informing their work. Though participants were quick to mention the gaps that these sources have for smaller regions or specific community groups. To fill this gap, participants emphasized the importance of lived experience and other informal sources from community organizations, network tables, and gatherings, which offer nuance that formal sources could not provide.

> "So for us, what we do is we do a full report, what we call a full report, after the census information comes out. So we always wait for that because for us here, it's probably our best source of data. We don't have a budget to do surveying ourselves." (P5)

To navigate this mixture of sources, participants assigned credibility to them, organizing and ranking some sources of knowledge as more or less trustworthy or useful. Grant applications and feedback reports were read not only for their content, but also as a pulse check on what is happening on the ground in the community and triangulated with other sources. Repeatedly hearing about the same issue across different sources, grant applications, conversations, community gatherings, and network tables became a key strategy for determining which community insights were credible. More formal sources, such as city reports or census data, were used to ground what is heard in the context of the community.

> "Yeah, I think like topics that are coming up at multiple networks are like barriers that are being identified, say, something like transportation in the region has been a huge barrier and so we hear about it, like at the [community group] meeting, you hear about it at food security conversations, you hear about it like in climate networks, it's like, oh, okay, this is really an issue that is cross cutting. And I think just like the repeatability of some of the data, you know, if you're hearing, you know, like knowledge or some kind of community priority multiple times from different people, then it starts to be reinforcing of that." (P10)

This assignment of credibility produced tangible outcomes and consequences for how CK entered CFs' decision-making spaces. Issues that surfaced across multiple informal and formal sources and were corroborated by city or official sources were more likely to be elevated to strategic and decision-making spaces. In contrast, issues that were expressed in isolation or in fewer sources were less likely to be taken into account unless they came through trusted individuals or met an existing fund/priority. Participants were acutely aware that dominant voices and narratives can "sound like they must be true" simply by virtue of repetition or louder voices, which led some to question whose experiences were still missing. Through this sorting and assigning of knowledge sources, CFs create a practice of identifying what credible CK might look like, even as they recognize that no single source could fully capture the realities of community life.

6.2.2 Translating between worldviews/belief systems

Participants describe working at the intersection of multiple knowledge systems, including donor and board logics, diversity, equity, and inclusion frameworks, Indigenous and land-based knowledge, neoliberal thought, and everyday community narratives. In these conditions, conversations about how to support the community were often emotionally and politically charged, especially when touching upon issues related to Indigenous rights, reconciliation, marginalized groups, and historical harms. Many participants were themselves positioned between worldviews and belief systems. For example, CF staff who hold intersectional identities and/or are DEI trained, working with conservative donors or board members, highlighted the ongoing work of navigating different audiences and knowing the language that would ultimately land with specific stakeholders or when to hold back.

In response, participants engaged in what can be called translation between worldviews and belief systems, connecting and mediating knowledge and values across different ways of knowing and thinking to keep conversations moving while trying not to completely erase core commitments.

> "I try really hard to listen to their point of view. And I try really hard to find common ground with where they're coming from. So if you've done any of this work, and I've done a lot of DEI work, Vincent, you can tell where the fragility is. You can tell where the discomfort is. You can tell where you can push. And you can tell where pushing is not going to get you anywhere. Even a gentle nudge. So then it's about taking that information and trying to find those places where we have commonality with the foundation's goals. So you want to give, and you want to support the community, then I'm going to stick with that. If your faith tells you that you're supposed to give back, that your tradition is part of giving back, that charity is part of that, then we'll focus on that. And we won't focus on the other pieces, because I don't think I'm going to make much headway." (P4)

With donors, this often meant reading the room for fragility and discomfort, then reframing concepts (such as DEI) in terms of shared values, such as service or the moral obligation to give back, rather than directly naming specific groups or ideas. Participants describe focusing on broad principles to secure agreement or buy-in, while quietly holding more specific equity goals in view for themselves. In Indigenous contexts, translation took a different route, centring the teachings, language, and land-based knowledge that were foundational to the interpretation of CK. At the same time, some participants shared their intentional practice of asking themselves whether they had the right and access to operationalize knowledge that was not their own, and when they should seek further guidance and permission from local nations.

> "It's how do you operate, operationalize it? You know, and I have to always acknowledge that me and I only have, there's [a few] of us, but it's, we're all visitors to the we're not, we're not Coast Salish. And I think it's how do you bring that knowledge into our practice in a respectful way. But also, moving forward, because they've entrusted us to do this. […] And so, yeah, so I think in that every day, it's, it's just deciphering around what I feel I have agency to kind of, you know, […] to, to act on or, or always acting though, hopefully, in that, right? Yeah, speaking on behalf of anyone" (P3)

These translation strategies had important outcomes for how CK was expressed and acted upon inside CFs.

> "And so I think, you know, those are things that we also think about is, you know, what's the traditional territory, not only what the lands have to offer, but also like the resources, but also then what's been taken away, right? And so and that lived history, I think is also part of our community knowledge. And, and again, we've got one community in particular that had a residential school, that's had quite, you know, a significant that's part of their community, […] and that impacts their decision making in terms, you know, like such a thing as, you know, the school where the lands where it was, like, do you, do you rebuild on that? Do you turn it into something like those, all those things make, I think are part of the considerations as a community." (P3)

On one hand, they opened space for equity, reconciliation, and Indigenous worldviews to enter strategic and donor conversations that might otherwise shut down in the face of direct challenge. On the other hand, the need to maintain relationships and "meet people where they're at" meant that some aspects of CK were softened, generalized, or left vague, particularly when they conflicted with dominant donor or board perspectives. Participants thus became key interpreters of how far each knowledge system could be brought into organizational practice at a given moment, shaping which insights travelled further as actionable and tangible knowledge and which remained at the edges of internal decision-making processes.

6.2.3 Finding patterns & similarities

Participants describe occupying roles in the community that gave them access to numerous sector-specific spaces, like housing coalitions, early years education tables, senior networks, health committees, youth groups, climate committees, ED gatherings, alongside formal inputs like grant applications and census reports. These conditions created a fragmented knowledge environment in which no single source offered a complete picture, particularly in small regions where institutional knowledge often failed to account for local contexts and emerging needs. Participants highlighted their ability to move between these spaces, noticing connections and repetitions that siloed community actors might overlook.

> "And so you hear about, you know, the housing sector, and then I go to [the] early years education table. And so then that's talking about obviously like everything that has to do with child development. And then I go into [the] seniors network table meetings. And I'm sitting on a committee right now for health care. […] all of these things are different sectors. But there are common discussions that are human. So we like to sort of like silo and like categorize things like there are commonalities among all of those. And with that, I think like, that's our sort of privilege of being a part of all of those different tables and coalitions and everything, because then we can see opportunities for efficiencies or like potential partnerships or like shared initiatives among those sectors who may not necessarily be seeing those." (P1)

To make sense of this fragmented information, participants learned to identify patterns and similarities, actively scanning and sensemaking bits and pieces from knowledge sources to identify what mattered most.

> "Yeah, I think like topics that are coming up at multiple networks are like barriers that are being identified, say, something like transportation in the region has been a huge barrier and so we hear about it, like at the youth workers meeting, you hear about it at food security conversations, you hear about it like in climate networks, it's like, oh, okay, this is really an issue that is cross cutting." (P10)

In the same way that participants used repetition to assign credibility to knowledge sources, they also saw it as a way to identify the data's importance and relevance to their work. By participating in these cross-sector spaces, participants identified opportunities for efficiency, partnerships, or shared initiatives with otherwise unrelated community actors.

> "And so with the funding from [the city] as the funder and with [social enterprise] as the facilitator and the, you know, the expert in the private sector, and with the [CF] as the nonprofit charitable convener, then we were able to make that possible. And so I think that, that partnership was incredible. And I really believe in the possibility of, yeah, I don't know, I just like saying it's like, it's the trifecta, right? Like getting them together is like, where so much can happen." (P1)

These recognition practices supported the CF's ability to strategically interpret and prioritize community needs.

> "So yeah, yeah. And we also participate in several other like community processes and networks and things where we also are always, you know, checking the pulse or looking for trends and patterns. […] And I think just like the repeatability of some of the data, you know, if you're hearing, you know, like knowledge or some kind of community priority multiple times from different people, then it starts to be reinforcing of that." (P10)

CFs can develop a panoramic view of how certain issues are showing up in their communities, moving beyond the usual sector-specific framing to one that crosses into other sectors. Enabling the potential identification of systemic issues that require a collective, cross-sectoral approach to solve. In the same vein as assigning credibility, the CF's ability to notice patterns is subject to similar constraints. If certain knowledge sources are absent from their networks or rely on staff presence, there is a risk of skewing the patterns that emerge that ultimately shape decisions.

6.2.4 Management of access

Participants shared the multiple access points they managed through which community actors could share insights, from structured and formal processes such as feedback surveys, strategic planning sessions, and grant applications to informal and relational opportunities such as participation in gatherings, events, conversations and committees. These conditions were shaped by the funder and community power dynamic, where some community members and organizations saw funders holding "far more power than they probably should" and avoided meaningful engagement. Shifts in Indigenous governance models also required the renegotiation of access and relationships. Participants described an active design and negotiation process to ensure that access points were low-barrier and included community voices.

> "Yeah, I can think of one nation that we work with in particular, their hereditary leadership felt very strongly that we needed to be like more aware of their priorities. And so we arranged an opportunity for them to meet directly with our board and to speak to the priorities in their own way and yeah, give us their input […] because of changes that are happening within the nation and just like the change from the chief and council to hereditary leadership being our like point of contact. And so it almost felt like, okay, here's a good way to start on this next phase of our relationship by hearing directly from [them] what was pressing and [their] experience had been." (P10)

By structuring who could speak directly to their board, leadership, and staff, and under what terms, participants created a predictable avenue for knowledge to flow into the CF.

> "So we could get together and discuss issues, […] obviously everyone's discussing issues and they're talking about work. And then there was also just for different agencies, there was an agency group that would get together monthly as well. And every, you just go around the, it would always start with going around the circle, just something new about, you know, your organizing, your programming, your community. […] Well, I really like the idea of using it to connect, like for a reason, you know, like it's like here we have a reason now to, and to create a baseline of, you know, stats. […] like that we're receiving from, you know, all the other parties and then we're compiling them and we have that baseline and it's all in one spot." (P7)

These intentional engagement opportunities, like ED gatherings, sector gatherings, or invitations for community organizations to attend Board meetings, tended to prioritize established relationships and trusted organizations. Methods such as monthly newsletters, door-to-door canvassing, and AGMs ensured that access also reached those less connected.

These access management strategies influence which sources exist, how the CF accesses them, and shape their work.

> "I don't do anything without deep consultation with the team. Especially at this stage of our development where I'm not in the field as much as I used to be. And I don't even read the grant applications anymore. Like, like I, I'm not the one that can say, you know, which, which need is

> most important right now, right? […] But that is all based on me knowing for a fact that my staff are out there listening to people. And so they're out there listening to people. So therefore I have to listen to them.” (P2)

Individuals with established relationships or comfort navigating the funder-grantee power dynamic gain an amplified voice, influencing decisions through repeated presence and trusted status, while peripheral voices who enter through less familiar avenues may be filtered. By managing these access points, CFs determined not just whose knowledge is listened to, but in what form and with what authority it is carried.

6.2.5 Discussion: Managing Knowledge Systems to Navigating the Board

The findings in 6.2 describe how the cultivation and translation of CK enter the CF environment and interact with the institution's inner dynamics. It encounters layers of internal processes through which its credibility is evaluated, meaning is negotiated across worldviews and belief systems, patterns are interpreted, and its access is managed. These four properties, together, create the environment in which CF leaders and staff steward CK within their organizations. These practices are largely informal and individualized, relying on staff expertise and skill to determine what knowledge is real, relevant, and usable for their internal processes. This discussion section situates these practices within the literature to examine what they enable CK to do within CFs and what risks arise from their usage.

The assigning of credibility by participants in 6.2 aligns with what Medina (2013) articulates as a function of epistemic authority in determining the credibility of knowledge sources based not only on their intellectual content but on their perceived legitimacy within a given community or institutional context. Participants’ usage of triangulation across multiple informal and formal sources as a practice of adding credibility is pragmatic and reasonable, given the limits of a single data source and capacity within their organizations. However, this approach does carry systemic risk that participants themselves named. That dominate voices and frequently repeated narratives can easily assume credibility not because they are more accurate, but because they are more present. Fricker (2007) describes this as testimonial injustice, the organizational over-crediting of familiar, socially dominant perspectives and the under-crediting of those who speak from marginalized positions in society. The triangulation practice that participants use to assign credibility may inadvertently reproduce this dynamic when the sources, networks, and individuals being used to triangulate share similar organizational culture, geographical reach, or worldviews. The question of CK's credibility isn’t just about frequency but about its diversity as well.

The translation practices (which differ from the informal to formal translation process) described in 6.2 represent some of the most challenging processes that participants undergo to leverage CK in their work. Participants’ accounts of the politics and complexity of navigating donor and board fragility, reading rooms for discomfort and passive aggression, and finding shared language across divergent values and worldviews. These accounts align with several of the authors in the literature review, who name this as the ongoing negotiation between donor interests and worldviews and community-centric values and approaches in CFs (Hodgson, 2020b; MacKenzie, 2021; Millesen & Martin, 2014; Wu, 2025). However, the findings go beyond what this literature captures by surfacing the specific challenge of translating Indigenous and land-based knowledge into organizational practice. Participants described a form of introspective and reflexive translation, checking their own agency and access before leveraging knowledge systems and sources that were not theirs. This reinforces their commitments to reconciliation and working in partnership with local host nations. This stands in contrast to Fricker (2007) description of hermeneutical marginalization, where institutional actors interpret community experiences through incompatible framing without reflecting on whether or not it is appropriate or capable. The findings suggest that the CFs are aware of this and, at times, believe it to be the strategic move to bear this cost. By translating CK into the language of board or donor logics, where it is likely to be softened, deferred, or held back, there is still an opportunity to influence decision-making processes incrementally. In these cases, it means that some aspects of CK are more shaped by the whims of the board and donors than by the communities' actual priorities and interests. This tension becomes even more present in later categories, where these translations impact the actions boards are willing to endorse.

The ways participants described their interactions with CK involved quite a bit of pattern recognition. As highlighted in 6.1, this practice layers onto the knowledge brokering role that CFs take on and shows how they actively analyze what they are hearing. Where 6.1 described the cultivation of access to diverse knowledge, 6.2.3 describes what CFs do with that informal pathway. They take a birds-eye view of the sector, identify overarching themes, and synthesize what might otherwise appear as unrelated signals into a coherent picture of systemic community need. This aligns with Meyer et al.'s (2021) characterization of CFs as uniquely positioned community actors whose presence in the sector generates a form of knowledge that no single organization could produce on their own. Participants' descriptions of "panoramic" awareness, seeing housing, childcare, eldercare, and climate issues as interconnected rather than isolated, align with what community development literature articulates as a systemic understanding of a community's reality. One that moves beyond scratching the surface of community issues to understanding the systemic conditions that perpetuate them (Ife, 2016). As some participants noted, the panoramic view is only as wide as the people and networks the CF can access. Pattern recognition, like credibility assignment, is bottlenecked by the same limitations of reach and access, meaning that the systemic picture being painted will likely still be partial.

The management of access described by participants in 6.2.4 shows the pathways in which CFs steward and manage CK, through the intentional designing of avenues, formats, and terms of engagement where community actors can approach and share insights and experiences. These approaches find alignment with participatory philanthropy literature's highlighting of institutional readiness and the design of inclusive engagement processes (C. Gibson, 2020; Hauger, 2023b). Participants' accounts of unlearning and learning access in response to Indigenous governance and protocols when working with elected council versus hereditary leadership reflect the community-centric principles of trust-based philanthropy (Fleming et al., 2024; Trust-Based Philanthropy Values, 2021). Embracing learning in and with community on approaches that best suit their needs, while also setting the rules of engagement based on their existing practices and protocols instead of the CF's convenience. However, access management also introduces a filtering function, where structured access tends to prioritize established relationships and organizationally stable actors, while broader reach methods, like newsletters and AGMs, reach those further away from the CF but without the depth of knowledge that relational access could produce. That isn't to say that broader reach methods are not without their worth, but it raises the ongoing tension that CF's hold between breadth and depth of access that no single strategy fully addresses.

Together, these four properties in 6.2 describe a process of managing knowledge that is largely interpersonal, individualized, and contingent on the capacities of CF staff members. This is both a strength and a risk, it enables nuanced, context-specific handling of diverse knowledge sources, but it also concentrates epistemic authority in ways that may not always be transparent to the community or the board. Though that isn't inherently a negative thing, in 6.3, participants describe strategically navigating and even circumventing their board to achieve a community need. 6.3 Navigating Board Dynamics and Expectations will show that the credibility assigned to CK through the processes in 6.2 is not easily operationalized at the decision-making level. It must be renegotiated against board and institutional norms and interests, where the gap between what CF staff know and what boards are ready to endorse becomes a central challenge in how CFs practice centring community needs.

6.3 Navigating Board Expectations and Dynamics

Participants overwhelmingly shared their boards as both crucial allies and significant constraints in how CK is leveraged in shaping decisions in the organization. Four properties emerged from this category that describe the variables that staff navigate when responding to board expectations. Board risk tolerance captures how boards' varying tolerance for financial and reputational risk conditioned whether CK played a role in decisions. The governance and operations tension reflects the participants' efforts to keep boards focused on strategic oversight rather than the organization's day-to-day operations. Board composition details the education and membership needed to shape the board's openness to leveraging CK. Finally, negotiating discomfort and resistance describes how staff and board members confront long-held perceptions, practices, and assumptions that CK challenges.

6.3.1 Board Risk Tolerance

Boards operate under varying levels of risk tolerance, often shaped by asset size, history, and perceptions of their roles (Graddy & Morgan, 2006). Participants experienced a variety of risk tolerances; some boards were supportive and open to discussion on new ideas and directions. Many felt stretched outside their comfort zone when presented with new ideas or requests from staff and the community, such as impact investments or trust-based philanthropy. Others also shared that their boards were highly cautious about reputational risks, preferring to avoid public stances or actions that might be perceived as controversial, even when CK clearly pointed to unmet needs.

> "I know that most recently the board chose not to write a letter of support. And that was for an affordable housing unit complex actually um that and I guess in this case because it was to be situated on what had been earmarked for [other] purposes so there's a lot of pushback from half the community, half the community was like no we need more affordable housing the other half the community said well that's great but not on this [property] um so I'd say in that respect the board just really didn't feel like it was going to make much of a difference if they wrote a letter of support anyway [...] and felt like they didn't want to step right into the middle of that because they weren't landing on either side, [...] so they chose not to write a letter, I don't know if that's right" (P7)

One approach that participants shared to respond to this was the assembling of layers of CK, vital signs reports, years of community conversations, census data, and visible community "buy in", to demonstrate that proposed actions were both socially and financially necessary. They detailed how the decision aligned with board fiduciary responsibilities, showing how impact investments could address clearly documented needs while also enhancing the CF's financial position.

> "And I can tell you from the perspective of being a [senior leader] of a foundation, and having to convince the board of directors [of this new idea]. I can tell you that if we didn't have the vital signs stats, the community buy-in, and the several years of gathering the community input to say this is

essential, they never would have done it. It would have been ridiculous to take that chance if we hadn't done all of that work in advance.” (P2)

Some shared their longer-term approach of slowly introducing new ideas through repeated exposure, external presentations, and incremental discussions to gradually increase the board's comfort before seeking formal decisions.

> “So we are looking at impact investing. We've never done it before. It has taken me [many] months to get them to a place where they actually would listen to […] a presentation [about it]. But, but we are now exploring the idea of impact investing.” (P4)

When evidence and community support were robust, boards could be persuaded to take decisions they initially perceived as risks and later regarded as some of their most successful projects. At the same time, even strong CK did not always overcome deeply rooted fears about reputational risks; some boards remained unwilling to sign letters of support or take overt public stances, limiting how CFs can respond to community needs and reducing their status as community actors. Board risk tolerance thus acted as a gatekeeper, enabling certain community-informed strategies while constraining others.

6.3.2 Governance & Operations Tension

Participants describe experiences navigating boards that either get caught up in the organization's operations or scope creep from strategic oversight to operations. Meeting agendas were frequently packed with operations. New board members unused to CF governance roles found it easier to focus on concrete and tangible tasks than on higher-level strategic planning. In these contexts, the risk was that boards would both overstep into staff responsibilities and underperform their own governance responsibilities, leaving limited time and attention for strategic engagement with CK.

> Me: “Is there an example you can share about how all the CK you collect gets diffused internally? How do you bring it to your board for strategic planning or decision making?”

> P6: “Yeah, I would say that that's probably a little bit tougher. I mean, because the board is a little bit more operations-focused than governance. Every single board meetings packed with operations.”

There were a variety of responses to managing the tension between board governance and the organization's operations. Many engaged in deliberate boundary-setting to distinguish between the two buckets of work. Some described being “paranoid” about projecting the board’s governance role, intervening quickly when discussions drifted into implementation details. Others restructured decision-making processes so that detailed grant decisions were made in committees, with the board receiving summaries of decisions and focusing on criteria, granting policies, and overall direction. Educational efforts, such as AGM sessions that explained endowments and operational workflows, were also used to help new board members understand where their contributions were most needed and to build their confidence to engage with strategic content in meetings.

> “…and the secret formula is to be absolutely paranoid about their governance rule. And, like, I mean, paranoid, like, whenever there's the slightest little sniff of someone leaning towards operations, instead of governance, I flip out, right? Like, I am so paranoid about it. I realized that, at least from my situation, being that strict about it has been critical. Yeah. And because what ends up happening otherwise is that the board gets bored, the board forgets to do board things. And, you know, there's

a risk of them getting into operations, that's its own risk. And that's a huge risk. But to me, the bigger risk is that they forget to do board work." (P2)

Where setting boundaries were effective, boards spent more time on strategic questions and oversight, creating space for staff to leverage CK without constant micromanagement. This allowed CK gathered through various sources to be translated into operational changes by staff, with the board focusing on overall fit and risk rather than detailed decisions. In contrast, when boards remained heavily operations-focused, strategic discussions were few and far between, and there were fewer opportunities to collectively interpret what the community shared. Some participants linked this constraint directly to the board's inability to recognize and respond to more complex and emergent community needs and instead remain focused and entrenched on financial growth. A participant highlights it this way:

"uh because it grounds you in your work it because it unites us in a focus in what we should be doing my mind and again all qualified by saying this wasn't a universally held view with the foundation but there was this uh you know the money is the method through which we accomplish our work um and you know we need the money to do the work but at some point along the way those things got switched. The money became the purpose of the organization, and the purpose of the work was you know we knew we were required to distribute this [percentage annually] and we'll do that and then we'll scrooge mcduck in the [rest of the] money … Yeah. So there's a lot of dysfunction there. And then the during something like a strategic planning process, we gather, I'm sure you've been to lots of these yourself. We would use the lexicon of the not-for-profit, you know, we need to create impact. We need to engage the First Nation, yada yada yada. But then we go back to the board table after that. And it's like, we need to be targeting the 1%. We need to be talking to financial advisors…" (P8)

6.3.3 Board Composition & Learning

Many participants shared that their boards were composed of committed community members and professionals new to the philanthropic sector and its work. While some have had encounters with CFs through grants or as a donor, they were new to the logics that underpinned CF governance, grantmaking, and, in some cases, EDI and reconciliation work. Participants highlighted membership changing during their tenure, either through terms expiring or intentional efforts to adjust the makeup of the board. In some cases, participants shared the positive nature of their board, one marked by curiosity, good-faith debate and discussion, and overall interest in representing community needs. For others, their board cultures were marked by limited nonprofit representation, entrenched attitudes on community giving, and unresolved conflict between members. These conditions meant that board openness to CK was poor and closely tied to those who sat at the table and the support they received to interpret emerging community needs. This also meant that change was difficult to achieve, even on the smallest scale.

"So from that point on, we had people with experience in the sector, but we didn't really have anyone who was active as a staff member. We had one or two volunteers who joined, but again, the on-the-ground experience and knowledge were fairly limited. Attempts to move in that direction were pretty strongly discouraged. […] We saw a lot of turnover in those positions. And we had some rather entrenched individuals on the board who were very much invested in this idea that the foundation was essentially money managers for donors." (P8)

For some participants, there were investments in formal and informal learning opportunities to bring new board members into the fold. In cases involving more senior members, and only in some cases, there were deliberate changes in composition. By influencing the board's function, some participants identified compositions that better aligned with their community-informed direction. Some used their organization's strategic planning process as an opportunity to educate board members on the changing context in which the CF operated. A few increased the number of members on their boards and made intentional recruitment efforts that adjusted the balance of particular groups, worldviews, and perspectives to better reflect the community. Others diffused some of the board's decision-making powers by standing up granting committees or community-based committees to embed missing experiences and insights in their work. In these cases, the board generally still has the final say on the decision but rarely opposes it in practice.

> “So changing a board takes time. And so that's what I've been doing. I've changed the composition of the board. That is not to say that the [typical demographic and expertise] members of my board are not still there. But it shouldn't be more than 50% of my board because they are part of the community and they should be reflective of the community … And I think EDs have an obligation to work towards making sure that the board composition is reflective of the community and reflective of the change that is happening in community.” (P4)

Where these strategies were implemented, board members were described as “totally open to learning and understanding,” which resulted in a gradual shift in their understanding of the CF’s role in the community and its strategic direction. Education and composition change made some boards more receptive to practices that leveraged and amplified CK, such as multi-year funding, operational funding, community-led committees, or region-specific advisory groups.

> “I think it is a bit of that what I said a little bit before, like just the education piece, like, so people come, you know, join the board because they want to support and they want to help and they want to, but they might not come with knowledge about granting, or they might not, you know, and so I can tell them that. But I'm one person. And so having sort of like the experts in it being, in this case, the charities themselves saying it just strengthens [it]. But like, yeah, particularly like, there's definitely been questions from grant committee members or board members over the years when we started doing this multi-year funding that like, but aren't we just creating like a crutch for that organization? Like, can't they figure it out on their own? Like, are we just making this, you know, are we pulling the bandaid off slowly? So it's really just changing [the board and committees] perspective on giving and support. So yeah, I think it's just a nice way to reinforce that, it is meaningful to those organizations and that they do use it for some of those reasons, not just me saying it.” (P5)

Conversely, where board composition and culture remain resistant or dominated by problematic behaviour, participants linked this directly to difficulties in legitimizing lived experience and community perspectives in board discussions. In some cases, this led to fractured boards, resignations, and stalled progress until key individuals left or membership changed.

> “So yeah, we had a very fractured board. A small group held a very different view of community charitable work than the rest. And unfortunately, this sort of smaller group of longer tenured, quite entrenched. So it did result in a fair bit of turnover in a lot of the other board positions. Not only did we not have the representation from the not-for-profit sector, but there wasn't really an interest in bringing it. […] And again, don't get me wrong, we were able to recruit some excellent board members, […] people who I feel were genuinely interested in contributing. But without the firsthand

> knowledge, without that deep understanding of these [community] issues, DEI, even though there is now a policy in place, was just never something that was seriously addressed." (P8)

6.3.4 Negotiating Discomfort and Resistance

Many participants described their boards as appearing supportive and fair-minded, but when confronted with CK and internal feedback that challenged their self-perception and performance, such as evidence of racialized funding patterns or feedback on exclusionary practices, they were taken aback. Coupled with CFs pushing for and introducing new strategic directions (equity, reconciliation, trust-based philanthropy, different granting practices) that exceeded what board members were comfortable with supporting. Participants described much of their time with their board negotiating and navigating their discomfort and resistance to feedback and new ideas. However, for some participants, this discomfort and resistance were short-lived. For this group, their governance structures offered an arms-length granting committee or consensus-oriented leadership, which created both opportunities and limitations for the impact of their discomfort.

> "So I did a, so going into strategic planning and saying, hey, there's the perception that we're white, that's anecdotal, that's from my conversations. The data, I love data, that is great. So I looked at the last 10 years of our granting, and we had given less than 1%, like very low, low, low, low percentage to Indigenous-led or Indigenous-serving organizations out of our granting pool, out of our community granting pool. And they said, that can't be right. And I said, we have given less than 1% out of our community granting pool to [racialized group] or [racialized group] serving organizations. That can't be right, [ED], and I said, let's pull the data, shall we? And so the data put their backs up even more. These are the things I learned, right? Put their backs up even more, but they can't argue with it. This is where we've awarded money." (P4)

> "Yeah, they are a consensus board. So there's always lots of time to talk through items. That's something that's important. And I think one step or one key that's emerged over years is like always making sure that the people are in the room for the conversation. And sometimes there are things that come up and that you might be missing an important voice at the table [...]. And so that's really being able to let things breathe and take the time to make sure that people are there for the conversation. And trying to ensure that everybody has an opportunity to speak because sometimes in a meeting or a group it can get, you know, certain voices can dominate. So I'd say that's something that we're really intentional about." (P10)

Participants shared several approaches to navigate these conditions. Some used radical transparency, directly bringing discomforting data to the board and insisting that they collectively examine it despite resistance, while also naming the gap between intention and impact. Others pushed change forward without seeking prior permission, only to report back afterward and "beg for forgiveness," believing that formal approval would have been initially denied. Arms-length spaces, such as grant committees, were used to introduce new funding approaches, so that abstract principles (such as trust-based practices) and concepts (EDI) were grounded in concrete examples and scenarios. In these spaces, members could express their views, work through conflict, and eventually become familiar with how CK could inform their work without the pressure of the full board, or, in some cases, without board presence.

> "And so I got to bring that opportunity to my grants committee and say this is trust-based philanthropy and we're going to pay for salaries and we're going to pay for like just admin

> expenses. We're just going to give them money for what they need it for. And so I did a lot of education. I wrote a brief. I kind of took the amount of funds that we had and gave them some idea of how we would grant out. you know we wanted to give out some big grants. We wanted to also include smaller grants so we could you know grant, to many organizations. And I have to say they totally took on the challenge and were open-minded. Yeah, and then when there's conflict amongst them, they just go into this really great respectful dialogue, which is really heartening to see and witness." (P9)

For some participants, these strategies produced incremental but meaningful shifts in how their boards engaged with CK and community-centric ideas. Some shared that initial defensiveness was expected and, given time and discussion, came to see the changes as necessary and wrestled with their discomfort as part of the process of aligning with community realities.

> "the same time the board has reflected over the last year and a half with gentle nudges. Um, okay, [ED], like if that is the truth, and if that is the reality, how do we do better without making ourselves uncomfortable? And that's been the interesting dynamic and play around making sure we're moving the dial on equity while the board figures out how comfortable they are with the changes. They see the changes as necessary. They see the evolution as necessary. They struggle with their discomfort." (P4)

Though one participant shared that, regardless of what was shared, how it was shared, and the number of opportunities to learn and engage with the community, some members remained steadfast and entrenched in their views.

> "But I, I do feel that there was a racial bias on this individual's part, knew nothing, like any application I think that we saw in our time there and this individual had been on the grants adjudication committee since I joined, […] but viewed everything through that prism of being a former [finance professional], like evaluating applications as if it were a loan. These people are too high a risk, we shouldn't. That's not the way it works." (P8)

Grants committees and boards that developed habits of respectful, data-informed dialogue became more open to practices such as trust-based grantmaking, funding operational costs, or adjusting strategic directions in response to CK. In less receptive settings, discomfort translated into entrenched resistance or a glacial pace of progress, which increased staff workload and burnout. In all cases, negotiating discomfort was central to whether and how CK could unsettle established expectations and reorient the CF's strategic direction.

6.3.5 Discussion: Managing the Gatekeepers to Asserting Agency

The findings in 6.3 reveal that boards are not passive recipients of CK, rather, they are active and often unpredictable gatekeepers and overseers whose risk tolerance, governance direction, composition, and readiness for change collectively determine how much of what CF staff bring from their communities can be acted upon. This discussion section situates these four properties within the non-profit and philanthropic literature to examine how the findings align with boards' conceptualization and handling of CK in their oversight roles, and what conditions encourage or discourage its use for community-centric work.

The risk tolerance dynamics described in 6.3.1 are consistent with what Graddy and Morgan (2006) Identify as a defining characteristic in a CF's strategic direction. CFs in the community leadership stage must wrestle with boards whose risk tolerance is shaped by financial accountability focused on preserving the endowment rather than on community responsiveness. Participants' layering strategies, assembling reports, census data, community narratives, and years of informal conversations into coherent evidence, reflect what the literature describes as a legitimation process, where knowledge must be converted into something measurable and defendable before it can cross into the formal decision-making space (Brown & Chao Guo, 2010). This is directly consistent with Fricker's (2007) concept of testimonial injustice, where CK expressed through informal channels is treated as insufficient until it is corroborated by sources the board already recognizes as credible and legitimate. What is significant here is not only that participants had to do this work, but that its success was never guaranteed, even well-documented CK could not always overcome a board's aversion to reputational risk, leaving community needs unaddressed, not for the lack of evidence, but for the lack of the board's courage.

The governance and operations tension described in 6.3.2 maps closely onto what Chadwick-Coule (2011) identifies as the failure of conventional linear governance models to meet the complex and emergent needs of the community. When boards default to operations-focused activities, they eat into the very limited meeting time and strategic attention that CK needs to be heard, discussed, and acted upon. Participants' strategies to set agenda boundaries, decentralize granting decisions, and bring in educational interventions reflect the adaptive strategies that Reid and Turbide (2012) describe as characteristics of leadership-board relationships under conditions of organizational growth and change. The development of trust between the two groups begins with role clarity, where clarity is established through deliberate and intentional negotiation rather than assumed. Where this tension was resolved, boards could engage with and internalize CK at a strategic decision-making level, where it persisted, CK remained trapped at the staff level, unable to surface into the spaces where organizational direction and decisions are formally made.

Board composition and learning, described in 6.3.3, is a significant structural property in this category, as it sets the conditions for the board to receive and engage with CK before the other three properties enter the process. Brown and Guo's (2010) argument that board roles are shaped by both organizational context and external factors is active here. Boards populated by professionals unfamiliar with charitable work and its logics, DEI frameworks, or reconciliation commitments defaulted to the knowledge systems they brought with them, namely, financial risk management, donor stewardship, and transactional views of charitable work. Participants' strategies of incremental education, composition change, usage of granting committees, and community-led advisory groups are attempts to redistribute epistemic authority within the governance structure, not just to inform the board but to reshape and influence who counts as legitimate within it (Medina, 2013). Dula et al.'s (2026) faces of power framework highlights how power shows up in this space. While not overtly so in every case, domination was enacted through the hegemonic normalization of specific knowledge systems. Donor and financial logics were the default approaches, making alternative ways of knowing feel out of place and out of scope at the board level.

The negotiation of discomfort and resistance described in 6.3.4 represents the most politically and socially charged property in this category, and it is here that the literature's typical framing of board governance shows its limitations. Participants' accounts of boards being confronted with racialized granting data, or of chairs flatly rejecting territorial land acknowledgements out of fear of liability, describe what Medina (2013) calls active epistemic injustice, not simply the absence of CK at the strategic level, but the active resistance to what it may potentially offer. The strategies participants used, such as radical transparency, arms-length granting committees, beg-for-forgiveness approaches, and existing strategic plans as a legitimizing tool, are not just governance hacks; they are responses to institutions whose dominant values have not caught up with the communities they claim to serve. Chadwick-Coule's (2011) argument for a pluralistic governance model grounded in the interdependence of board and staff is critical here, where participants managed to create that interdependence, even momentarily, boards moved from defensiveness to curiosity, and CK moved from illegitimate or contested to real and possible.

Together, the four properties in 6.3 describe a governance environment in which the board functions as the final gatekeeper in the CK's journey from community into organizational strategy, and unfortunately, a most unpredictable one. The informal cultivation in 6.1 and the knowledge management in 6.2 can produce rich, nuanced, and well-triangulated CK, but whether it shapes the CF's actual decisions and direction depends heavily on what happens when it arrives at the board level. This finding has implications not only for CFs but for how the sector conceptualizes governance readiness. The question then is not only whether a CF has the staff capacity to engage with CK, but whether its governance culture and structure have the epistemic openness to receive it. As *6.4 Asserting Strategic Direction and Agency* will describe, participants do not simply wait for boards to be ready; they actively intervene in that readiness through positional leverage, cultural change strategies, and at times, deliberate risk-taking that moves community-centred work forward with or without board approval.

6.4 Asserting Strategic Direction & Agency

This section describes how participants assert strategic direction and organizational agency as they work with their boards and community organizations, drawing on CK they hold, or try to access, and leveraging it in decision-making and relationships. Across cases, participants described shifting organizational culture to normalize CK as legitimate and usable, leveraging their positional and institutional power to strengthen CK's standing with other community actors (including, at times, their own board members). A central dynamic in this category is navigating friction, internal resistance, external pressures, and the reality that competing community priorities mean any strategic direction can create disagreement or alienation. This sets up the final property, strategic risk-taking, in which participants highlighted their pursuit of community-centred approaches through new funding practices, new forms of engagement, and new partnerships to respond to complex local needs. While participants note the time and capacity required, they also describe this as iterative; assertion generates additional insight and CK that can enable further strategic clarity and agency over time.

6.4.1 Shifting Organizational Culture

Participants all shared the understanding that CK encompassed more than organizational "intel," including knowledge held within groups and communities, as well as knowledge embedded in land and place. In this framing, the participants' recognition that colonial histories influenced current priorities and relationships at the CF, and that they can miss the need if their knowledge practices rely too heavily on formal sources or the same familiar voices. This also surfaced the practical reality that communities are often incredibly diverse and that no single person (or group) can fully represent a community's needs, making it necessary to treat CK as incomplete and contested rather than singular and settled. Finally, participants all grappled with the sector's dominant logics, like the value of endowment building, donor stewardship, and minimum disbursement rates, while advocating for redistributive values that inform community-centric practices.

> "I think it means like the collective knowledge and experience of the people and the land. Yeah, I think that the history of this place is like, there's knowledge that our human communities hold. And then there is knowledge that yeah, the land and even non human communities hold. And that's something I sort of like dip my toes into learning about through a relationship with the [local First Nations], and just recognizing that, you know, the human experiences aren't the only experience in this region. And so there are other beings that are living here as well. And they have knowledge and relationship with the land and with humans." (P10)

> "… the weekly basis is just, you know, that colonial context, right? Like, I think that the trauma, you know, and so, again, trying to decipher and present the work in that strength based way that I talked, shared earlier, that's so important to us. And I find that's, that's hard, you know, like, I think, especially in philanthropy, right? Because what, what's the thing, like, yeah, like, homelessness to Harvard, like, people want those stories. […] they want an immediate idea that it's helping someone. And ours is a lot longer, our journey for some of, you know, for some of, especially [being] trauma informed […] It's just gonna take a long time." (P3)

Participants describe strategies to shift culture by increasing informal connections to the community and building repeatable organizational habits of interacting with CK through opportunities like open houses, tabling, and community gatherings. Some participants highlighted the practice of treating these connections as primary data sources, layering them onto existing knowledge systems. They also described CK as operationalized through structured reflection and sense-making, turning what is heard into internal memos and facilitating conversations to reinforce a shared interpretation of community insights. In contexts involving Indigenous and BIPOC communities, participants described relying on structural frameworks for shifting culture: trust-based philanthropy (TBP) offered a way to reorient the funder-grantee relationship, while the tools based on the 5Rs for Reconciliation offered a facilitated framework rooted in the work of Indigenous scholars that are designed to surface shared values and bring reconciliation into organizational practice. Many participants also highlighted professional development (PD) as a way of shifting culture through learning, creating opportunities deepen skills and knowledge of staff to engage communities in meaningful ways.

> "So when I came into the sector and started hearing about trust-based philanthropy […] immediately I thought, Oh, this is going to be great. This is going to be, you know, in terms of like, all they think this awareness is there and it's, it's, it's in, you know, whereas sometimes you have to bring those things strategically, um, yeah, we felt again, like that, um, definitely played into some of our planning. But I think in the end, like that, again, just because it's being talked about doesn't mean it's happening. Right. And so don't get me wrong. There's, there's, there's definitely a shift towards that in some areas, but it's certainly not wide scale." (P3)

Shifting culture is not an easy task for any organization. While many participants described culture shifts as producing stronger relationship quality with community actors when the CF's approach is experienced as respectful and grounded rather than extractive or performative. They also point out the tensions that arise when trying to “decolonize” a colonial institution that holds great wealth and power. Traditionalists, like donors or board members, have certain expectations of a CF’s role and how it presents itself to the community. So while some community actors may welcome this shift, CFs will have to simultaneously navigate those who disagree with its new direction.

> “…my feeling is community foundations are somewhat uniquely susceptible to the, um, [this experience] because so much of our identity, and place in the community is wrapped up in that endowment fund, like for so long, it was kind of my opening line talking to people like, you know, we're a community organization and we've got $[X] million or whatever in invested assets. And I kind of had this epiphany one day. It's like, who cares?” Right. We shouldn't be showing up like, you know, we're rich and we're here to save the day. Yeah. That's not any part of my own values. And yeah. So making that shift, you know, it was probably a couple of years before I stopped leading with, you know, we're a $[X] million dollar [endowment], because that's ego talking. And it's not the way this work should be done.” (P8)

6.4.2 Leveraging Positional Power

Many participants emphasized the unique position that CFs have in communities, holding broad and deep CK because of the cumulative nature of grant applications, community outreach, consultation, and cross-sector participation. They describe the institutional role itself as enabling an insider/outsider dynamic, where CFs can be embedded enough to understand the local context while also spanning enough tables to identify patterns and systemic barriers. This positional power was also described as relational and time-dependent, built through repeated contact, stability, and sustained presence across community networks.

> “…is the result of listening to those residents and community experts and those lived experience and so on. And that active listening and participation side by side in the community, that community foundation should be doing. That also puts us in a position of having a certain level of community knowledge that is, in my opinion, unprecedented, or potentially unprecedented. I think that we are as community foundations better positioned than just about anyone else to have the breadth and depth of knowledge about what's happening in our communities, whether it's through our, you know, doing a really intelligent job of receiving and educating grant applications, or with community outreach and consultation and collaboration. So community knowledge should be something that we are experts in, you know, if we're doing our job right as community foundations.” (P2)

Participants describe strategies that leverage their positional power by convening community actors and creating spaces for listening and coordination, including sustained participation on committees and panels, facilitated gatherings that surface shared challenges, and networking opportunities among themselves rather than just with the CF. They also described creating safe opportunities for knowledge sharing, including recurring network meetings that encourage organizations to surface what is going well, what is difficult, and what others should know. Some participants further described knowledge-sharing strategies that help disseminate CK, such as distributing community reports widely, presenting findings to councils and networks, and hosting conversations that bridge data with lived experiences. Some participants leveraged this power to also connect the needs of smaller, less-capacity organizations in spaces where only large organizations could access. In these cases, participants describe advocacy as part of this positional work, particularly when the issue is visible, but funding is not the only, or the primary, lever available to the CF.

> "But we do have, we're fortunate to have quite a bit of funding for [community group]. We had a fund that was set up and a large portion of it is for [community] programming. And then there was a lot of division amongst all the different community organizations, like everybody sort of was fighting for their slice of the pie. So [we] took a couple years and brought together a [community] table where everyone wanted to sit because when there's division, people want to be there. Yeah, because they got a fight for their territory. And it was really interesting. And I think it really highlighted where some big holes were in the […] community services. It highlighted that one sort of umbrella organization should be created to house a lot of that. Not everything. Not everybody wanted to be, but that was required. But there was funding required. So then after those couple of years, [we] went in, and started funding a [community] manager. And [Another CF] said okay, we don't really want to take on another portfolio, but we'll take on [this community]. So they took them on because it wasn't housed anywhere, you know, so that was great" (P7)

Leveraging their positional power often increased their perceived legitimacy as a community actor because the CF could credibly claim a holistic understanding of community needs and could bring together the right people around them. Participants linked this legitimacy to increased ability to influence others, particularly in creating shared baselines of data, stories, and priorities that other sectors could reference and interact with. At the same time, participants highlighted that positional influence carried ongoing expectations around representation and accountability, including the recognition that "one seat at the table is not enough" and that governance and engagement structures may need to evolve to be better inclusive of community autonomy.

> "And yeah, just really focused, you know, I think things changed. There's a lot more mention of diversity, equity, and inclusion, Indigenous rights and reconciliation, and a real focus on just legacy and community impact and building our network and our role in the community is as leaders and knowledge keepers, you know, it's kind of what we became part of it." (P6)

6.4.3 Navigating Friction

Participants described friction as a central property of asserting strategic direction within their organizations. Described as largely internal, participants face board resistance as a recurring condition, including governance resistance to change, competing views of risk and legitimacy, and boards that hold narrow definitions of what a CF should prioritize. While fewer in number, participants shared external examples of friction, including divided opinions within the community and tensions between community needs and donor interests. The board's understanding of the CF's role, however, played the biggest role in generating friction. When shaped by the board's understanding of the role of the CF's as endowment building or donor stewardship rather than community responsiveness, participants described sustained efforts to introduce community-centric approaches. In one case, a participant shared their challenge in even convincing their board that these approaches (multi-year funding, reconciliation work, DEI) were legitimate possibilities for their community work.

> "I brought up with the then chair and vice chair, a territorial recognition, which was flatly rejected for fear that it was going to create some sort of liability. So, okay, well, I don't see how that's happening. But okay, I'm going to leave this. I'll fight that battle later. And it came up on lower levels, and eventually came up with some other board members. And there was a great deal of skepticism about it. So I was asked to connect with the ED of another organization that has done some fantastic work in reconciliation and connecting with First Nations in our area. The meeting was really uncomfortable. There was the ED, myself, the chair and vice chair. My chair at the time, just very curious what the experience was, what the differences were, vice chair, just body language, attitude, everything just flatly opposed to we're not doing anything special for [Indigenous communities]." (P8)

Participants worked with several strategies to connect boards more directly with CK, particularly through education and by introducing community voices into the board room rather than relying solely on staff summaries. Others described strategically using grant feedback surveys and application data, for example, by including questions they knew the community would respond to in ways that strengthened the case for practices the board wasn't certain about. Every participant had strategic plans that framed the community at its centre. By using this plan as a framework for holding direction under friction, they described referring back to the agreed-upon strategic direction to demonstrate that the work was consistent with, rather than departures from, existing organizational commitments.

> "And so sometimes, you know, as I talked about what the board is ready for, and what they may not be ready for, I still go full steam ahead. And so I use the strategic plan as my backbone, as long as I'm keeping to the strategic plan. And I can report it, so I don't always ask for permission. Actually, I very rarely ask for permission. I, but I'll beg for forgiveness afterwards, or I'll prove or demonstrate how it's related to the strategic plan. So that is the way that I get through a lot of work, because if I asked for permission, I'm getting a no all the time." (P4)

The consequences of navigating friction ranged from fragmentation, where board and staff holding divergent understandings of the CF's role in the community, to strengthened buy-in when education and exposure shifted what felt legitimate and possible. Participants noted that where friction was navigated successfully, CK could move from informal and contested to formal and actionable at the board level, expanding the organization's capacity to respond to community need. In contrast, where boards remained locked into narrow definitions of CF mandates or donor-first logics, strategic CK often stalled at the staff level, limiting what could be acted up upon.

> "Yeah, and I think it's pretty much like the main drivers being you know, moving away from the consideration that we are just grant makers and that whole idea that we need to start making our endowment work for the community, not just the income earned on the endowment. […] I think there seems to me to be that we're definitely getting some pushback, and I believe, understandably, against that idea of everything needs to be endowed, and we only use that 5%, you know, to further our purpose. And so there's definitely some pushback on that, and it makes sense, and the board agrees as well that it's something that we really need to be harnessing more of the power of the endowment." (P7)

6.4.4 Strategic Risk Taking

Risk-taking emerged as the final property in this category in examples where participants described their realization that conventional CF tools are insufficient for addressing the complex needs that CK is surfacing. Some participants described their risk-taking in situations where the community's needs were urgent and required unprecedented action. For others, it was a strong desire to improve the CF's impact on the community and dissatisfaction with existing approaches that often prioritized organizational safety over community needs. In most cases, participants noted growing awareness of the gap between the CF's existing approaches and tools and the community's aspirations. Building on the tension between conventional CF logics and the redistributive values that staff were trying to act on.

> "So rather than going through the [...] old method of bringing it to the board and getting [approval], I just moved ahead. And it was kind of amazing. We [...] raised nearly [a significant amount of money] for helping folks in [region]. A lot of housing needs were met. There was [...] a director from [that area] who got very involved. We ended up creating a not-for-profit in [that region] to support those individuals who didn't have [...] insurance or were sort of precarious in their living situation. So around that [...] individual coalesced a group that became a not-for-profit. So they would go out, they would do individual interviews with folks who [...] were in need of assistance. And then it progressed to [...] we were [providing mobile housing] for folks, putting re-establishing electrical and sewage systems, partnered with [a] faith-based not-for-profit group to help build homes for folks. It was, yeah, to my mind, that is, that was us self-actualizing and playing the role. And it was [...] fantastic, like, on an organizational level, fantastic PR for the foundation. We were in front and center of it, we did some fantastic things over there, created some incredible relationships. So the concern on, again, some board members, not all, was that that would take away from our endowment building. Since [a few years ago], we have seen almost exponential growth in donations; engaging with the community, to my mind at least, clearly is making an impact. So in terms of scale, I kind of feel that there was a case to be made that engaging with community and being there for community was working." (P8)

Experimentation became the strategy for many participants. Some pivoted part of their funds to pilot new ways of convening community organizations on a specific issue, giving them agency to determine how best to set up the gatherings. One shared their intention to manage their funds differently for a certain period to experiment with "how their endowment can work differently for community." Many described forming new cross-sector partnerships with local actors, like businesses, and investing in the conditions for collaboration. In most cases, participants described strategies for creatively working around constraints and identifying alternative possibilities when conventional approaches did not meet the need, yet the CF still perceived a responsibility to respond.

> "So they asked if we had any ideas. And, um, so here's me listening to their problem and trying and understanding, you know, they've got this big challenge and I know from listening to the community that this is a need and, you know, all the steps that we normally do. Um, but the, the normal answer to their inquiry would be, um, we don't have a grant program that can solve your problem. Um, I went to my board and they said, we can't grant to these folks, but why don't we [acquire a physical property] and [make that asset available] for them to [use], [manage the resource] and be their [partner] for, um, for as long as they need. So, um, that it's, um, it's, so it, you know, it's the willingness to look at it a different way, not just within the way we always do

> things. Right. There's no point in getting new information if you don't change the way you do things." (P2)

Strategic risk-taking produced new approaches to impact that sat alongside conventional granting cycles, including new infrastructure for community engagement, new forms of investments, and new ways of addressing community needs beyond funding. Participants described how experimentation and risk-taking often generated additional CK by revealing what organizations actually need, what barriers are most impactful, and what becomes possible when actors are brought into new ways of working together. In this way, risk-taking can reinforce agency over time through generating insights, which can further support or refine strategic directions and build the organization's credibility and confidence as a community actor.

> "And, you know, when we did our strategic plan, we talked about, like, how do you kind of leverage, you know, partnerships with [commercial and corporate sectors] where, again, the, you know, the extraction of [resources] has done such harm? And how do we, you know, use that as a vehicle to change, like, you know, give people again, in those businesses looking to do acts of reconciliation, [a pathway for that], so that was always part of our strategic plan is being open to, to all those different ways that we see kind of that being happened in the role the foundation can play and kind of facilitating some of those conversations, but also like in our role as, you know, bringing in funds, raising funds and then distributing them back to community and for the communities themselves, right. And so and now I think, you know, strategically, again, with more with my colleagues, it's like what, you know, looking at, like, being bold and saying, like, what are let's look at transfer [of] capital, you know, like, you know, and again, you have these, when you dig in, and you look at these, the different values of endowments, […] And so, how do you, balance kind of your ways of ensuring disbursement happens and nobody goes without." (P3)

6.4.5 Discussion: Asserting Agency as a Knowledge Mobilization Practice

The findings in 6.4 describe a leadership attribute that is not necessarily captured in the board governance and participatory philanthropy literature. Specifically, the ways that CF leaders and staff do not simply react to organizational conditions but actively shape and reshape it in order to steward CK into and through their CF's decision-making processes. This discussion situates the four properties, shifting organizational culture, leveraging positional power, navigating friction, and strategic risk-taking, within existing literature to examine how this category activates how CK contributes to organizational strategy in CFs.

Interestingly, the organizational culture shifting described in 6.4.1 reflects what Dula et al. (2026) articulate as the power of subjectification, but in reverse. In their framework, subjectification describes how community actors internalize the funders' worldviews and logics as their own, unintentionally reproducing their values and assumptions. What participants describe in 6.4.1 is an attempt to disrupt the internal version of that same dynamic, the internalization of donor-centric, endowment preservation, and formal knowledge logics by CF staff and the board. By naming the colonial histories of CFs, including land-based knowledge systems, treating CK as inherently incomplete and contested, and explicitly naming community-centric values alongside existing sector practices, participants were enacting a form of epistemic authority from within. This aligns with Medina's (2013) concept of epistemic resistance, in which marginalized knowledge holders build credibility not by conforming to the dominant views, but by actively questioning and reframing them. Notably, this culture-shifting work was not undertaken only in board meetings or strategic planning sessions; it was embedded in daily operational processes, staff language, and organizational descriptions, suggesting that cultural change in CFs begins as a quiet and persistent reorientation before it surfaces as formal practice or policy.

The positional power strategies described in 6.4.2 expand on the existing literature's functional description of a CF's role in convening community actors. Where Meyer et al. (2021) and Alaimo & Carman (2022) characterize convening as something that CFs can functionally do, participants here describe it as something they strategically deploy to amplify CK and shift power dynamics towards community actors. By participating in cross-sector tables, facilitating gatherings that expose systemic gaps otherwise invisible to siloed actors, and advocating for organizations that lack the resources to access collaborative spaces directly, participants translated institutional legitimacy into a community benefit. This use of positional power is consistent with how Fleming et al. (2024) describes the conditions for trust-based philanthropy; redistributing power not only in grantmaking but in the processes of knowledge creation and collection, priority-setting, and access. However, the findings also reveal a tension the literature does not fully address: the more participants leveraged their positional power to amplify CK, the more community actors expected them to consistently and comprehensively represent that knowledge. Positional power, in this light, generated accountability that likely extends well beyond what any individual participant could easily fulfill.

The friction dynamics described in 6.4.3 are where the board governance literature finds its clearest alignment in this research. Brown and Guo's (2010) finding that board roles shift based on organizational context and external factors are consistent with the participants' accounts. The boards rooted in donor stewardship and endowment logics defaulted to narrow mandates when confronted with community-centric practices, generating friction as a predictable consequence of strategic directional change. Reid and Turbide's (2012) trust-distrust framework is also aligned here; participants' use of strategic plans as a legitimizing tool, their deliberate introduction of community members directly into the board space, and their use of layered data to articulate the realities of community all reflect a process of building institutional trust while managing institutional distrust. What is significant and expands the literature is that participants treated friction not as a failure or fault of board governance, but as an expected and, in some cases, productive part of moving CK into organizational strategy and decision-making. Rather than quickly resolving friction, the most effective strategy was to give it time and space. This allowed boards to process discomfort, encounter and internalize community realities, and gradually shift the definition of what is counted as legitimate knowledge and action in the community. This reframes friction from a governance problem that staff need to manage into an introduction to new knowledge that needs to be facilitated and stewarded.

The strategic risk-taking described in 6.4.4 is the most significant property in this category, as it highlights the personal and reputational risks that CF staff are willing to take to move the needle on community-centric philanthropic work and raises questions that the existing literature has not addressed yet. The participatory philanthropy and trust-based literature consistently frame community-centric practices as contingent on organizational readiness and board buy-in and approval. This describes *what* good practice looks like when the right conditions are in place, but offers little on what practitioners should do when these conditions are inconsistent or absent. Some participants described a different approach; they saw waiting for readiness as itself a political act that reproduces the harms of the status quo. In some cases, participants explicitly described their strategy as moving forward without board approval, only to report back and justify actions through demonstrated alignment with their strategic plan or through the results of the outcomes. While this mirrors what Infante (2021) critiques as a risk of trust-based philanthropy when enacted without structural accountability from the powers that be, the participants' accounts offer a more nuanced interpretation. That strategic risk-taking is not a reckless act but a carefully calculated judgement that their board culture and bureaucracy, if left unchallenged, would prevent the organization from fulfilling the very mandate these structures were designed to protect. This finding also builds on Graddy and Morgan's (2006) organizational life cycle framework, where strategic directions (donor service, match maker, and community leadership) are not simply stages an organization arrives at through capacity development, but through contested positions that CF staff must sometimes claim on behalf of communities before governing structures are fully ready to engage with them.

These four properties in 6.4 describe strategic agency as a part of the process of mobilizing CK. The informal processes in 6.1 generated access to CK, 6.2 built the systems to manage and make sense of it, and 6.3 named the governance constraints that it encountered. In 6.4, participants describe what they do when CK is in hand, but the organizational pathway to decision-making is blocked; they shift culture, leverage their position, absorb and manage friction, and, when necessary, act first and apologize later. This is not simply a leadership style or specific individual behaviour, but a structural response to a structural gap. The vast distance between what communities need and what CF governance systems and structures, without active intervention, are designed or willing to deliver. As 6.5 *Mobilizing Community Knowledge for Community Reciprocity* will show, this assertion of agency is not an internal act; its ultimate goal is returning what has been collected to the community through connection, dissemination, and careful stewardship of the knowledge that was offered in trust.

6.5 Mobilizing Community Knowledge for Community Reciprocity

This section captures how participants described reciprocity as an outcome of engaging with CK, not just as an ethical stance, but as a sense of obligation. In their eyes, reciprocity was enacted when CFs used what they've learned from communities to not just improve grantmaking or strategic decision-making, but also to strengthen local relationships, public policy, and infrastructure. Circulating useful information back to the sector and community, and stewarding sensitive knowledge with great care. Rather than treating CK as something to be collected and stored away, participants described mobilizing it in ways that returned value to community actors, supporting their work, reducing isolation between organizations, and increasing access to shared knowledge about community needs and trends.

Across interviews, three properties emerged that were most central to the category. Playing the role of community connector, closing feedback loops through knowledge packaging and dissemination, and stewardship and selective circulation of knowledge. Each property describes a slightly different way that reciprocity was made practical. Connecting people to each other, returning knowledge to the community in accessible forms, and protecting knowledge that was not meant to travel beyond specific relationships, contexts, or regions.

6.5.1 Playing the Role of Community Connector

Participants described their local charitable environment as largely made up of small to medium-sized organizations, who often lack the capacity to consistently network, coordinate information, or "see past what they're doing today." Under these conditions, CFs were positioned as cause-agnostic actors with a birds-eye view across the charitable sector, able to maintain relationships with many organizations at once and to note where needs overlap, where effort is duplicated, and where opportunities for collaboration exist. Participants also note that CFs' proximity to both community organizations, donors, and government created a unique bridging position, where introductions and connecting dots could itself be a form of reciprocal value.

> "So in our local charitable sector, there's some big charities. and so they can do their own thing. But there's many more smaller and medium-sized charities that just don't have the capacity to see past what they're doing today sometimes. But we can share, hey, you know, you're doing this. We know so-and-so is doing this. You should talk to these people and get together. And that has worked really well. We don't always have to be a part of it. We just connect the dots. Sometimes they ask us to be that third party sort of independent because we're cause agnostic. So we don't, you know, identify with any one charity. We support them all. And so sometimes we play that role of bringing them together at a table and maybe facilitating that conversation or the initial conversation. […] …but the littler charities are doing some amazing things but don't have the time to sit at those tables." (P4)

In response, participants described mobilizing CK by actively engaging in matchmaking between community actors. This included introducing organizations to others doing similar work, convening initial conversations when a neutral facilitator was needed, and staying connected enough to know where support was required. Some leaders also described representing "smaller charity" perspectives at tables dominated by larger institutions, bringing sector realities into discussions where they might not have the capacity to attend. In this way, connector work was not limited to matchmaking but also included the ongoing relational maintenance that made accurate introductions possible.

> "But I think the most important one really is being out in the community, working alongside our partners. And being active conveners. We, we regularly convene community partners and citizens to just listen to what they have to say. So, yeah. And we make a point of being on panels and in on steering committees and, you know, I think between the rest of the team and me, we're probably on a dozen different steering committees. Where we hear what's going on around the region." (P2)

This connector role positioned reciprocity as building or strengthening community networks through increased coordination, reduced duplication, and new relationships between organizations, community leaders, and those who "hadn't connected yet." Participants also described this role as improving the CF's own granting practice as well, because knowing organizations better, and knowing what they are doing in real time, strengthen the CFs ability to interpret grant requests and respond to needs. Reciprocity, here, becomes cyclical through the collection, interpretation, and leveraging of CK. Enabling better relationships, which supports better decision-making, in turn deepens those relationships and the community's willingness to share.

> "So we'll sit at those tables and we will talk about what the charities are doing in the sector if other people don't already know. And we keep in touch, I keep in touch certainly with all my charities and they see it as a benefit because I know so many donors that I can introduce to them and also talk about legacy and planned giving. But also because the better we know each other, the better that we know what they're doing, the better we're able to inform our granting processes." (P4)

6.5.2 Closing Knowledge Loops

Participants emphasized that CK is often unevenly distributed; some people hold lived and practice-based expertise and experience that support their understanding of CK, while others (including their boards, donors, and staff) prefer that information be compiled, curated, and delivered as a product. Some participants describe this as translating what they're hearing into something that their audiences could consume and understand. Several participants operated under resource constraints that limited primary research and engagement, leading them to rely on existing datasets and community reports to develop knowledge products that "speak" to their audiences. In this context, reciprocity depended on whether CFs could move from collecting knowledge to returning it in ways that were useful, relevant, timely, and understandable by the community at large.

> "…but through, you know, documentation and reports that we put out like vital signs or the [community] report, [that goes out] into the community. And then through that information that we send out […] then we start to see grant applications come in because it becomes more pertinent […] from the nonprofits in town. So it's kind of a kind of this feedback loop, this flow through there, where the issue exists, we, we acknowledge it and put some documentation out on it. And then they realize that we're aware of the situation, and they start to build their grant applications more around these issues that they also know are a huge issue in the community. But it's, it's a really nice communication feedback loop, I would say." (P6)

Participants described packaging CK through reports and communications, then intentionally distributing it back into community spaces. This included creating Vital Signs reports (or similar community reports), using newsletters, blog posts, social media posts, and pamphlets to circulate grant stories and trends, and hosting community conversations to collectively interpret data. Importantly, these strategies were not framed as one-way disseminations. They often included facilitated conversations in which community members and organizations could add context, challenge interpretations, and surface potential actions, turning knowledge outputs into engagement tools.

> "We host community conversations. And so these are facilitated, small table facilitated conversations by staff and volunteers. There are a lot of open-ended questions. It's all about the data that's in the report. And so what we get out of that is, I think we usually have about 50 people show up to the community conversations and some come because they know nothing about the topic and want to learn more. Some come because they know a ton about the topic I want to share. And then there's some that I kind of just say are like observers for their own work purposes. We get elected officials. We get other people that come out and they're trying to figure out what is going on in this area. And they're sort of sitting there. They're participating, but they're definitely listening. They're using it as intel into what's actually happening. And so those are really successful. Those are an opportunity. Lots of things that we hear at the table are things like, I had no idea how bad that issue was like, all right, just like, you know, I just didn't realize it's affecting so many people." (P5)

Knowledge packaging created reciprocity by making CK usable beyond the CF itself. Participants described reports and communications as increasing awareness, shaping how organizations framed future grant applications, and providing shared reference points for decision-making across the local sector. In these accounts, the feedback loop is concrete: issues are heard and documented, documentation then influences community action and the next wave of requests, which in turn refines what the CF hears and funds. Reciprocity here enacted through circulation, knowledge is returned to the community as a resource that supports planning, advocacy, connection, and coordination.

6.5.3 Ethical Stewardship

Interestingly, participants also described that not all CK was meant to be circulated widely. Some knowledge was framed as entrusted, historically rooted, or relationship-dependent, requiring careful judgment about what can be shared outwardly and what should remain protected. This was especially true in cases where knowledge was tied to identity, community history, governance relationships, or when it could produce harm if taken out of context. Some examples from participants included knowledge connected to local First Nations communities, where cultural protocol dictates its handling, or knowledge from a marginalized group in their community, where it is specific enough to identify them. Under these conditions, reciprocity was expressed as stewardship, being a responsible holder of knowledge rather than a broadcaster of it.

> "We try to uphold and steward the knowledge that we've been given. And even look at that from a bit of a different perspective, we have a library and archive of materials. And so, yeah, we really try to maintain that, make sure it's accessible to people so that the knowledge that has been shared with us is, you know, has value in this world. It's not locked up in the basement. And vice versa, respect what knowledge has been given us just for caretaking and not for sharing." (P10)

Participants described practical stewardship strategies, such as documenting knowledge, establishing data policies, and making deliberate choices about accessibility and consent. This involved holding some knowledge in protected forms while also preventing unnecessary gatekeeping across the board. Stewardship also appeared as an ongoing interpretive practice, deciding how to represent knowledge, who to include in interpreting it, and when to pause rather than mobilizing information prematurely. For many, there was a strong awareness of one's positional power when engaging with this practice, and the reality that they were actively reshaping what they were hearing. In this light, stewardship isn't just about data management, but an ethical exercise in protecting the integrity of community stories while navigating the power dynamics of the sector.

> "The first thing that comes to mind for me is that there is a certain amount of power that comes with having the depth of [community] knowledge that we have. And I think our efforts over the last number of years to try to be sensitive to power imbalances in our society have made us less willing to exercise power […] I think using power for good is what needs to happen, as opposed to not using the power at all. And I think that we have had a tendency to be meek about the power we hold, and we need to use it, but use it intelligently and with ethics and morals and community benefit in mind. (P2)

Stewardship practices shaped reciprocity by strengthening trust and reinforcing the CF's legitimacy as a community actor. When communities experienced the CF as a careful steward of their stories, one that protected sensitive knowledge while still improving access where appropriate, participants implied that relationships deepened and knowledge sharing became safer. At the same time, selective sharing placed intentional limits on what could be mobilized into strategy or public-facing reports, meaning reciprocity sometimes required restraint, holding CK responsibly rather than turning it all into an institutional product.

6.5.4 Discussion: Stewardship of CK

The findings in 6.5 describe the final and most critical stage of the stewardship of CK in BC CFs, its reciprocal return to the community, albeit transformed into something more. The categories shared in 6.1 to 6.4 map how CK is stewarded from the community into organizational structures and decision-making. 6.5 describes what participants understood as a responsibility and obligation to what is collected, matters just as much as what is returned. This discussion situates three properties, playing the role of community connector, closing feedback loops through knowledge packaging and dissemination, and ethical stewardship, within the literature to examine how reciprocity is activated and practiced with intentionality by CFs.

The community connector role described in 6.5.1 extends what Hodgson and Pond (2018) articulate in the community philanthropy literature as the unique function that CFs hold. Namely, that they go beyond just funding, but can act as gatherers and redistributors of diverse community assets, including knowledge itself. Participants' accounts of convening, matchmaking, and cross-sector bridging reflect this articulation in practice but go further than the literature by showing that reciprocity begins in the act of connection, not only in the act of grantmaking. When a CF introduces two organizations working on housing and climate to each other, or facilitates a gathering where smaller charities can surface pain points and priorities to larger institutions, it returns CK to the community in the form of increased coordination, reduced duplication, and new relationships. This aligns with Grundmann and Osterloh's (2020) argument that communities are sustained not through individual action but through the cooperative and co-construction processes of community members coming together on a shared goal. By acting as the connection between them, CFs participate in the co-construction of community capacity, rather than simply observing or collecting from it. Importantly, participants linked this connector role directly to improved granting outcomes, where the deeper the CF's relational knowledge of the community and sector goes, the more accurately it can interpret applications and respond to emerging needs. Meaning that reciprocity is not just an altruistic byproduct but a structural condition for the CF's own epistemic legitimacy.

The knowledge packaging and closing the knowledge loop practices described in 6.5.2 address a gap that several participants acknowledged and recognized in their work. There is a disconnect between what is heard informally and what becomes institutionally visible and actionable. This gap is identified by Hauger (2023b), Kilmurray (2015b), and Meyer et al. (2021) as the persistent failure of well-intentioned philanthropic institutions. CK is encouraged and invited through engagement processes, but rarely returns in forms that demonstrate it was heard and used. Participants' strategies for packing CK, through Vital Signs reports, community conversations, facilitated dialogues, newsletters, and granting story compilations, represent a deliberate attempt to close that gap and make the CF's knowledge stewardship process transparent to the community. Additionally, the knowledge-loop closing participants described is not a one-way dissemination process but an iterative one. Where reports surface emerging or hidden community needs, prompting community organizations to reframe or rework their grant requests, thereby refining what the CF hears and shaping its future priorities. This iterative process affirms what Rose (2014) describes as the "know-how" dimension of CK or the community's capacity to turn knowledge into action. By providing CK, community actors can use this information to advocate for themselves, coordinate with others, and strengthen their organizational work. In this light, closing the knowledge loop is not simply a communications function but a mechanism for redistributing epistemic power, returning to the community the data and narratives that were initially theirs.

The ethical stewardship practices described in 6.5.3 are the most critical contributions to this category and extend the literature in two important ways. One, the existing philanthropic literature on participatory and trust-based approaches focuses largely on how to include CK. It says relatively little about the CF's obligations once that knowledge has been received. Participants' shared accounts of protecting culturally sensitive knowledge, applying data consent policies and practices, and making deliberate judgments about when not to circulate insights describe a form of knowledge ethics and stewardship that the sector has yet to formalize. This aligns with what the United Nations (2013) recognizes as the foundational principle of CK governance, that knowledge systems carry their own dissemination protocols, and that the authority to share should stay with the community of origin, not with the institution that collects it. Second, participants' stewardship practices directly address what Dula et al., (2026) identify as the power of manipulation, where a philanthropic institution defines what knowledge is considered in or out of scope according to their internal agenda. By actively seeking consent from the community on whether their knowledge is disassembled, participants refused a key mechanism by which institutional power consolidates itself. Stewardship, in this context, is an active and deliberate exercise of restraint and relational accountability that preserves the integrity of the community's contributions.

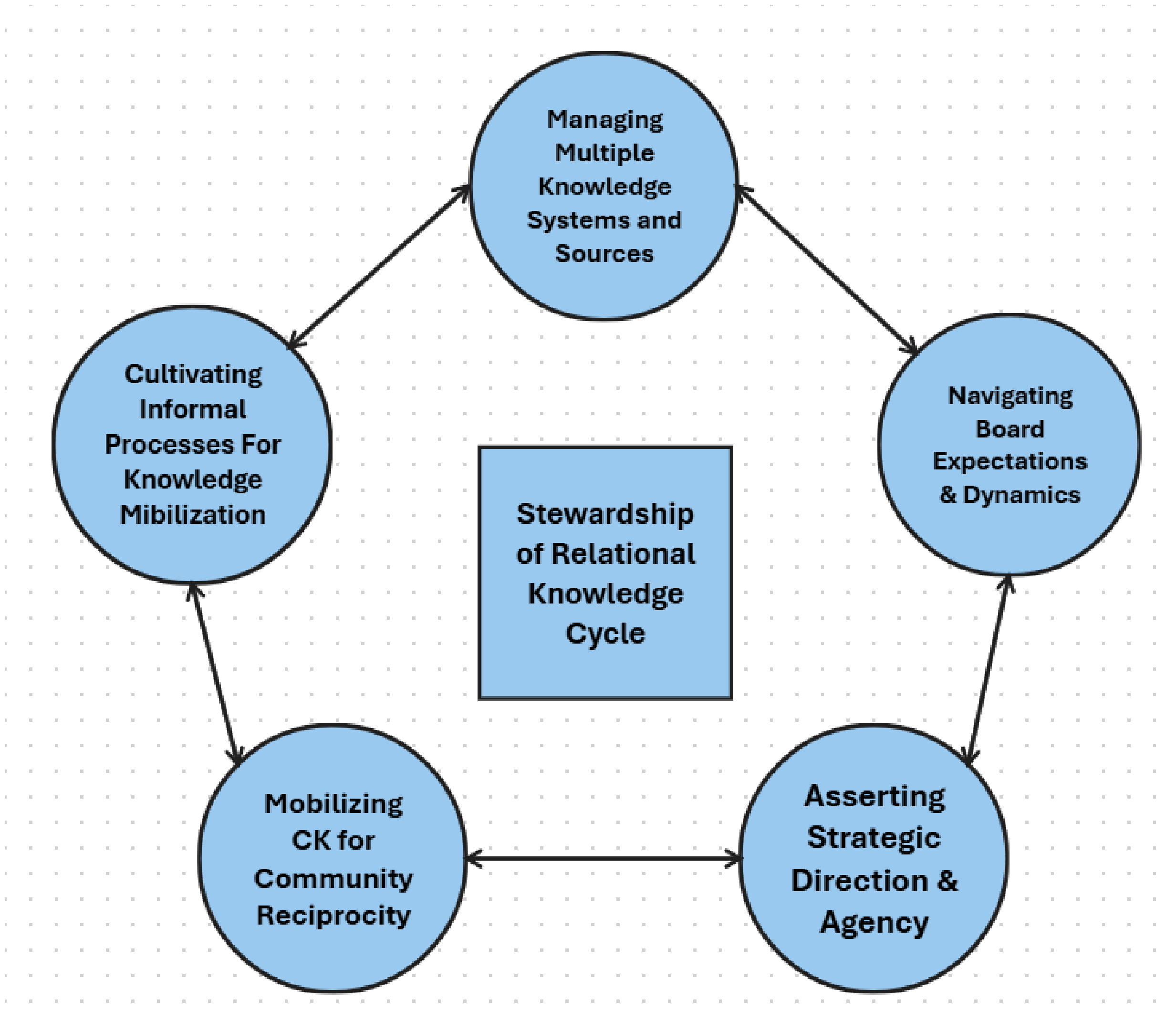
Taken together, the three properties in 6.5 describe reciprocity as the ethical test of the entire CK mobilization process. A CF can cultivate rich informal knowledge networks in 6.1, management multiple knowledge systems skillfully in 6.2, navigate board resistance effectively in 6.3, and assert strategic agency courageously in 6.4, but if it does not return value to the community informs the community can recognize and use, the process is extractive, not reciprocal. What participants describe in 6.5 is a practice of accountability, demonstrated through their connector work, knowledge packaging, and ethical stewardship. Highlighting that the community's knowledge was taken seriously, used purposefully, and returned with interest. This positions reciprocity not as a final stage of a linear process, but as the condition that legitimizes the entire journey. It also lays the foundation for communities to build their trust in CFs with their knowledge over time. Together with the preceding four categories, this emerging theory describes how BC CFs steward CK from its source in community relationships through organizational structures and back into community life, and identifies the relational, institutional, and ethical strategies and conditions that either sustain that stewardship or stall its potential.

6.6 Emerging Theory: The Stewardship of Relational Knowledge

It is worth pausing here to situate and contextualize the emerging Stewardship of Relational Knowledge theory in relation to the philanthropic frameworks and approaches surfaced in the literature review. Participatory grantmaking and trust-based philanthropy describe important and established approaches to inviting in and centring the voices of the community in the work of CFs. The participants in this study were, in many ways, enacting these ways of working in their day-to-day activities. However, both approaches largely focus on the front-end of community engagement; how CF design an inclusive process to invite community voices in. What remains underexplored in these frameworks is what happens after that engagement ends; how is the CK collected through these processes internally interpreted, validated, and filtered before it reaches decision-making processes? The Stewardship of

Relational Knowledge addresses this gap directly. Rather than describing how CFs should engage with communities, it theorizes the conditions, mediating processes, relational, and power dynamics that determine whether CK actually shapes the organization's strategic direction. In doing so, it reframes community engagement not as an endpoint but as the opening step in a longer cycle of knowledge stewardship, in which knowledge is transformed as it moves through the institution.

Figure 1. *Visualization of the Stewardship of Relational Knowledge Theory*



As Figure 1 illustrates, the Stewardship of Relational Knowledge is not a linear path in which CK is collected at one end and converted into decisions at the other. Rather, it depicts a cyclical, relationally informed process in which CK's influence on decision-making is indirect but consequential. Rather than simply serving as a direct input into decisions, it shapes the organizational conditions under which decisions are made, producing strategic outcomes indirectly. What counts as credible, what reaches the board, what survives validation, and what is ultimately returned to the community all determine whether CK influences organizational direction. This reframes a CF's accountability to their community as less about whether they are collecting enough insights from their community and more about how they are stewarding what is being collected. In this light, accountability to the community is measured by the integrity with which they conduct this work, the processes they use, and whose interests are prioritized. The theory then advances three core propositions:

1) CK is inherently relational and emergent. It is not a fixed or neutral input; it is co-produced through sustained relationships between community actors and foundation staff, shaped by the social and political contexts in which it is shared, and is always partial in its representation of a community's reality.
2) CK's influence on decision-making is always mediated. Before it reaches formal decision-making processes, CK must pass through a set of internal processes, including translation across worldviews, validated against existing priorities, credibility assignment, board dynamics, and leadership agency. Each of these processes filters what ultimately becomes usable in decision-making. These mediating processes are both enabling and limiting; they make CK understandable by institutional powers while also concentrating epistemic authority into the hands of CF leaders.
3) A CF's legitimacy as a community actor is contingent on the quality of its stewardship. It is not determined by endowment size, grant amounts, or the depth of its engagement. Legitimacy is earned and re-earned through the integrity with which a CF holds the knowledge communities have entrusted to them, acts on it transparently, and returns it in forms that are relevant, meaningful and useful to those communities.

Together, these propositions position CFs not simply as funders, but as key community actors that act as stewards of community assets whose internal practices, cultures, and structures shape what counts as useful insight for decision-making.

Chapter 7: Conclusion and Recommendations

This chapter summarizes the key findings and discussions of the study, highlights its methodological and contextual strengths and limitations, shares the researcher's reflections on the experience of conducting the study as an insider to the BC philanthropic sector, and concludes with a proposal for future research directions.

7.1 Summary of Key Findings & Emerging Theory

This study set out to explore the primary research question: How do CFs conceptualize CK and use it to inform their strategic direction and decision-making processes? What emerged from 10 semi-structured interviews with senior CF leaders is not a straightforward model of knowledge management, but a cyclical, relational, and ethically motivated process. The secondary questions: What internal factors or organizational culture influence their ability to leverage this knowledge? Through what processes does the CF validate and legitimize CK for decision-making? And what sources of CK exist for CFs, and in what ways do they have access to them? Deepen our understanding of this process by highlighting the strategies and conditions that enable CF leaders to actively steward CK within its organization. Five categories were surfaced from the interview data through coding, recoding, and constant comparison. Within these categories, the process of cultivating, managing, navigating board dynamics, asserting agency, and ultimately returning CK to its communities comprises a set of properties that detail how these categories show up in their respective contexts. Together, they form an emerging theory of how BC CFs steward CK from its community source, through organizational decision-making, and back into community life.

7.1.1 Answering the Research Question

This study began with the question: how do CFs in BC conceptualize CK and use it to inform their strategic direction and decision-making processes? The findings reveal that this question is not as simple as it initially appears and that the relationship between the two is a bit more complicated than a linear model of knowledge mobilization or community engagement would suggest.

CK is not conceptualized by CF leaders as a fixed or singular form of information. Across participant accounts, it is understood as relational, dynamic, and shared across multiple, often intersecting and conflicting knowledge systems. It is generated through sustained interactions with community actors and shaped by a combination of lived experiences, informal interactions, and formal data sources. None of which on its own is sufficient to capture the full picture of a community's reality.

In terms of use, CK does not enter decision-making processes as a direct or unmediated input. Its influence is contingent on how it is translated across worldviews, validated against organization and board logics, and mobilized through internal structures by CF leaders. Board dynamics, organizational culture, and leadership agency each function as a filter that shapes which knowledge is elevated, how it is interpreted, and whether it ultimately informs strategic decisions.

Taken together, this study finds that CK functions less as an input into decision-making and more as a relational resource and asset that shapes the conditions under which decisions are made. Its influence is therefore mediated, iterative, and dependent on the CF's capacity and willingness to steward it with integrity across the full cycle of its mobilization.

7.1.2 Conceptualizing CK as Relational Knowledge

To answer the primary research question, this study finds that BC CFs conceptualize CK not as a static data set, but as relational knowledge. It is understood as a dynamic, informal, multifaceted, and often polarized asset held within community relationships rather than in institutional reports or documents. Participants view this knowledge as inherently pluralistic and contested, requiring a shift away from seeking a singular truth and toward the practice of listening across multiple knowledge systems simultaneously. In this light, the "making use" of this knowledge is not a technical or practical act of data management, but a social and interpersonal act of interpretation and translation.

This conceptualization has important implications for how the sector understands CF's roles in their community work. If CK is not just information but requires relationships to access, then the CF's primary instruments for collecting it are not surveys or grant applications but intentional engagement and relationship-building. The quality and care placed on these practices will also determine how much CK is shared and who's CK is available as well. Participants who described the richest and most impactful CK were those who had been embedded and connected in their communities for years, whose presence was relational, and whose organization were transparent on their ability to act on what they heard. In this light, conceptualizing CK as relational knowledge suggests a kind of organizational culture and leadership abilities that mobilizing CK actually requires.

7.1.3 Board Readiness and Friction as Internal Filters

In addressing the first secondary question on internal factors influencing the leveraging of CK, the study highlights the board as the primary institutional filter and gatekeeper. The ability of a CF to act on community insights is directly proportional to the board's risk tolerance, ability to hold uncomfortable community insights, and its willingness to move beyond an endowment and donor-centric focus. Boards characterized by high risk aversion, donor or financial logics, or limited exposure to equity and reconciliation frameworks consistently emerged as the most significant barrier to the application of CK.

Organizational culture plays a secondary but critical role, where established habits of informal listening and community engagement build staff confidence to advocate for community-centric shifts. The practice of hosting regular community touchpoints, structured conversations, and spaces for staff to engage in community settings supported the development of this internal culture. However, friction remains a central property of this process, not as a sign of failure, but as a necessary condition of challenging entrenched colonial practices. Participants who described meaningful shifts in their organizations' relationship to CK named friction, discomfort, and conflict as part of the journey and a condition for which change became possible.

7.1.4 Validation as Persuasion

The second secondary question on the processes that CFs validate and legitimize CK for their work, this study finds that validation is a careful interpersonal and social practice rather than a purely analytical one. As some boards were found to prioritize professionalized or donor-centric knowledge, formalized data, or financial logics, staff utilized strategies of triangulation and pattern recognition to legitimize and build the case for community insights. By layering "cups of tea" and lived-experience narratives over formal sources such as census data and city reports, staff leverage the credibility of these sources to address the board's resistance to CK. This process suggests that validation in BCCFs is an act of institutional persuasion, in which staff must prove that community-oriented insights and solutions are legitimate forms of information within governing structures that are not ready to receive them.

CK gains traction in formal decision-making spaces where epistemic authority can be wrapped in the credibility of sources boards are familiar with or already trust. This tactical practice by the staff is necessary and requires a skillful balance between the informal and the formal. The risk here is that when CK cannot be corroborated by formal data, it remains vulnerable to being left behind. The deeper, longer-term work beyond triangulation strategies lies in the curation of board composition and culture that reduces the need for validation through persuasion. Where CK can be introduced in their original voices and on their own terms without the need for institutional translation.

7.1.5 Knowledge Sources and Access as Relational Assets

The final secondary question on the sources CK that exist for CFs and how they're accessed, this study finds that the environment of CK accessible and available to BCCFs is not simply defined by the expected organizational tools, like feedback surveys and granting applications. Rather by the depth and diversity of the relational networks that staff have personally built over time. Formal sources like census data, city reports, and other community documents were accessed and used, but participants consistently highlighted these as confirming what they already sensed in the community rather than revealing what they did not know. The knowledge that most directly shaped strategic direction arrived through informal channels: conversations in coffee shops, discussions at community tables, exchanges at sector convenings, long-standing relationships with community leaders, and accumulated pattern recognition from years of presence in community life. Most importantly, these sources are not equally available to all BCCFs by virtue of organizational presence. Access is built and earned through trust, consistent engagement, and sustained through acts of reciprocity. The quality of CK that is shared is therefore not just a function of the expected organizational role in the community, but of the shared history and relational credibility built with them.

The forms of knowledge identified but beyond the reach of most CFs also shape their relationship-building activities. Indigenous and land-based knowledge are held within communities whose relationship with philanthropic institutions carries histories of harm and extraction. Though many participants describe it as the most strategically valuable, there is agreement that intentional relationship-building coming first is equally valuable, if not more so. Where participants had made meaningful connections and working relationships, they attributed it not only to engagement strategies, but to public commitments to reconciliation/right relations and the patient rebuilding and relearning of what it means to work together over time. This suggests that the question of CK sources and access cannot be separated from the question of institutional accountability to its communities. The range of knowledge accessible to CFs is likely a practice and reflection of how it has treated the communities that hold it. Together, these findings suggest that access to CK is not a resource problem but a relational and ethical one.

7.1.6 The Emerging Theory: The Stewardship of Relational Knowledge

Bringing together these findings, they form a core theory of this study: The Stewardship of Relational Knowledge. This theory proposes that knowledge mobilization in CFs is a non-linear, cyclical stewardship process. It involves five distinct stages:

- Invitation: Cultivating access through relational ties and designed informality
- Translation: Mediating and managing diverse worldviews and institutional logics
- Navigation: Identifying internal barriers and outpacing them
- Assertion: Establishing agency to move knowledge through board friction
- Redistribution: Closing the loop through reciprocal return of knowledge, where it is also packaged in such a way that is relevant and useful for their needs

Unlike participatory grantmaking and trust-based philanthropy, which focus on how CFs design and implement inclusive processes to invite community voices, the Stewardship of Relational Knowledge theorizes what happens after the engagement ends. It maps CK's internal journey through the five stages and how they are transformed by each one, and identifies stewardship of that process as a fundamental property of a CF's legitimacy as a community actor.

7.1.7 Reciprocity as Condition for Legitimacy

This theory suggests that reciprocity is not just one stage within the stewardship cycle, but an ongoing iterative condition that determines the CF's standing within the community. It articulates whether their practices, whether knowledge mobilization, grantmaking, or any other philanthropic activity, are legitimate or performative. Therefore, a CF's credibility in the community is not necessarily defined by its endowment size or its engagement programs, but is earned through its stewardship of knowledge and relationships entrusted to it. When CFs take deliberate action to either restrain CK or take strategic risks, or make their CK process transparent and accountable, they are fulfilling their roles as relational stewards of the community's assets. This shift towards stewardship provides a strategic stepping stone towards what Graddy & Morgan (2006) describe as the community leadership model for CFs. It describes a fundamental change in the relationship between CFs and the community, in which its authority to act is understood as an extension of community will rather than board expectations.

This reframing of a CF's role as a steward of CK has implications for how BCCFs and likely other philanthropic institutions understand their accountability to the communities they serve. This study finds that reciprocity, when it was intentionally practiced, shaped how knowledge was ultimately returned to the community. Whether carefully packaged in accessible language or practiced through the community's specific protocols for knowledge sharing, reciprocity in this context describes a vision of CK mobilization grounded in the authenticity of community life. It acknowledges that CFs operate within colonial power structures that can not be undone through good intentions alone. It demands that those structures be navigated, challenged, and incrementally reshaped by leaders and staff who understand stewardship as an active practice. For CFs seeking to do right by their communities, who feel a sense of obligation to right historical and current harms, to fulfill their commitments to reconciliation, decolonization, and social justice. This study proposes that a foundation does not simply collect or engage with CK, but is open to being genuinely transformed by it.

7.2 Limitations of the Study

No research is without its limitations, and this study is no exception. The scoping of this study aims to articulate what is and is not possible in its findings and analysis. This section acknowledges the limitations in detail and suggests its implications.

The first limitation of this study is its scope. Ten participants, all holding senior leadership roles, were interviewed across a subset of BC CFs. While this sample was intentionally selected for comparability and organizational readiness, it excludes the perspectives of staff at operational levels, board members, community organizations, and grantees, whose experiences of the CK process would likely yield different insights. While participants spoke about their observations of these excluded groups during the interview, their accounts were likely filtered versions of what occurred. Thus, the findings describe a senior leadership theory of CK mobilization; they do not necessarily capture the full range of institutional perspectives that shape how CK actually moves internally. Future research directions could include these missing voices, which would likely significantly extend this theory.

The study is also geographically limited. All participants represent CFs in BC, and while the findings will likely resonate with peers and colleagues in other similar CFs across Canada, they may not generalize across the sector as a whole. BC's specific demographic, cultural, and Indigenous governance contexts shape the conditions participants described, which may differ from those in other regions. The emerging theory from this study will need to be tested in other community contexts, like rural, remote, or even urbanized regions, to see whether it holds or requires changes.

Finally, the exclusion of smaller and volunteer-led CFs was justified given the research questions' requirement for organizational readiness to engage with CK. This decision means that the conclusions of this study cannot speak to how CK mobilization is understood and realized in CFs in the earlier stages of their lifecycle. Given how Graddy and Morgan (2006) describes changes in the strategic direction of CFs across life cycle stages; this exclusion highlights a gap in understanding of how CK practices are initially developed and sustained.

7.3 Directions for Future Research

While this study offers a theory of how CK is conceptualized and leveraged by senior leadership in CFs, there is an opportunity to incorporate missing perspectives from the CF sector to further test this theory. Donors, board members, grantees, and other community actors would provide a broader understanding of how CK is conceptualized across these groups and the value they perceive it to bring to their respective work with CFs. Some of the findings suggest that donors and board members share similar worldviews and logics, providing an opportunity to study how donors can be influenced or educated to shift their perspectives on community-centric work. Additionally, the types of knowledge accessed and brought into the institution are not equal; identifying and examining their specific journeys through each internal process would also highlight which types of knowledge are implicitly valued and which require negotiation, and why. Reciprocity was revealed in this study to be a core condition for how CFs operate within their communities. However, the depth and reach of this reciprocity remain unexplored. This presents an opportunity for future research to evaluate the impact and value of reciprocity for communities, as well as how CFs can improve this practice. Similarly, flipping the theory around to explore how community organizations experience generating and sharing CK with funders. This feels like the most logical next step for future research, to examine how community organizations and members conceptualize their own insights and how they believe they should be used by CFs in their communities.

7.4 Reflections from the Researcher

Working through this study as an insider in the sector created both an enlightening and challenging pathway. As a professional evaluator working within the BC CF sector, I have spent many years observing and navigating some version of the same processes, tensions, and decisions that participants named in their interviews. At many points throughout the data collection and analysis phase, I found myself strongly connecting with several participants' experiences. The desire to "beg for forgiveness" rather than permission, the late nights spent thinking about who is missing from an engagement opportunity, and how to present community insights in board or senior team meetings without watering them down were some of the examples that reminded me of the internal wrestling that one holds while working within a CF. That connection motivated me to keep reviewing and comparing the hundreds of codes that emerged from the interviews. It also reminded me to slow down and figure out where the participant's experience was showing up and where my experiences may be clouding their story. My reflexive memo writing was not just a CGT protocol to follow, but an opportunity to separate my own preconceptions and the participants' experiences. Several times in the data analysis process, I found myself returning to my memo writing to quickly check myself and record my emerging thoughts on what I was reading. These writings became a messy journal of reflection and questioning, and provided me stability as I wrote and coded.

I took away many moments in my interviews with the participants. I had anticipated not knowing exactly how other CFs might be operating, but I was, at the same time, surprised by how many similarities there were across experiences. Participants, whether fully aware or not, often returned to the ethical weight they carried within their communities in the interviews. They acknowledged their own capacity limitations but also felt the tug of obligation to realize their commitments with them. They shared the weight of knowing but being unable to act, of bringing their board along the best they could, of the philanthropic practices they were trying to change, and of the community members they had yet to reach. This emerging theory felt less about knowledge management and mobilization and more about accountability. I hold closely what it means to collect CK responsibly, to steward it with integrity, and to bring it back in a shape that is useful and strengthens the community.

Finally, throughout this study, I became aware of who was absent, which ideas or concepts were not going deep enough, and whether I had enough categories for the theory. Given the time and capacity, I know I could not explore every corner or idea that emerged. By focusing on the specific subset and context of BCCFs, I hope to add another point to the roadmap for this research topic. While I do not and cannot claim that what emerged here is a complete picture of a CK mobilization process, it is a contribution to the various ways CF leaders attempt to meaningfully shift our understanding of accountability in philanthropic work. For me, the impact of this study on my own journey in this sector is clear. I am reminded of the duty of care and ethical stewardship I have over the stories and community knowledge that come my way as an evaluator within this sector. I remain committed to this stewardship role and to the ongoing work of ensuring that knowledge communities share with institutions like ours are held with the care, humility, and accountability they deserve.

Appendices

Appendix 1, Ethics Certificate of Approval

University of Victoria

Office of Research Services | Human Research Ethics Board
Michael Williams Building Rm B202 PO Box 1700 STN CSC Victoria BC V8W 2Y2 Canada
T 250-472-4545 | F 250-721-8960 | uvic.ca/research | ethics@uvic.ca

Certificate of Approval

PRINCIPAL INVESTIGATOR:	**Susanne Thiessen** (Supervisor)	**ETHICS PROTOCOL NUMBER:** Expedited review - delegated	**24-0448**
PRINCIPAL APPLICANT:	**Vincent Tom** **Master's student**	ORIGINAL APPROVAL DATE:	27-Jun-2025
UVIC DEPARTMENT:	**Public Administration PADM**	APPROVED ON:	27-Jun-2025
		APPROVAL EXPIRY DATE:	26-Jun-2026

PROJECT TITLE: **Leveraging Local Wisdom: Community Knowledge in the Strategic Direction of British Columbia's Community Foundations**

RESEARCH TEAM MEMBERS: **None**

DECLARED PROJECT FUNDING: **None**

DOCUMENTS INCLUDED IN THIS APPROVAL:
tcps2_core_certificate - vt.pdf - 06-May-2025
Appendix 1 - Invitation Email -vt v1.docx - 26-May-2025
Appendix 1.1 Phone Follow Up Script -vt v1.docx - 26-May-2025
Appendix 3 - Interview Questions -vt v1.docx - 26-May-2025
Appendix 2 - Consent Form -vt v1.docx - 26-May-2025

Conditions of approval

This Certificate of Approval is valid for the above term provided there is no change in the protocol.

Amendments
To make changes to the approved research procedure in your study, please submit "Amendments" or "Annual renewal with amendments" form. You must receive research ethics approval before proceeding with your amended protocol.

Renewals
Your ethics approval must be current for the period during which you are recruiting participants or collecting data. To renew your protocol, please submit a "Request for Renewal" form before the expiry date on your certificate. You will be sent an emailed reminder prompting you to renew your protocol about six weeks before your expiry date.

Project Closures
When you have completed all data collection activities and will have no further contact with participants, please notify the Human Research Ethics Board by submitting a "Notice of Project Completion" form.

Certification

This certifies that the UVic Human Research Ethics Board has examined this research protocol and concluded that, in all respects, the proposed research meets the appropriate standards of ethics as outlined by the University of Victoria's policies for research involving human participants.

Dr. Sandra Gibbons
Chair, Human Research Ethics Board

Dr. Cindy Holder
Vice-chair, Human Research Ethics Board

Certificate Issued On: 27-Jun-2025

Appendix 2, Interview Guide

Interview Guide + Questions

Opening Script

Hello! Thank you again for agreeing to take part in my research for my Master's in Community Development at UVIC. My name again is Vincent Tom, and I'll be conducting the interview today with you.

We'll have about an hour together where I'll be asking you a series of questions related to the community foundation sector, especially how you and your organization understand community knowledge and implement it in your strategic direction.

I'd like to remind you of the consent form that you signed before this meeting, which detailed how the data collected from this interview will be used for the study and the resulting thesis. I want to take this opportunity to see if there are any emerging questions about that. I'd also like to remind you that at any point during this interview, you are welcome to skip any questions and/or end the interview at any time. In doing so, we can discuss whether the collected data can be used or removed altogether.

Do I have your consent to begin the interview?

If there are no other questions, we can begin the interview.

Initial Questions

1) Let's begin with an introduction. Could you tell me a bit about your role at the organization name and the length of time you've been working/volunteering here
2) From your perspective, what is the mission of organization name?
3) From your perspective, what are some of the main issues that organization name is trying to address in the community?

Core Questions – Community Knowledge

4) What does "community knowledge" mean to you in your role and capacity?
5) When you think about "community knowledge" in the context of organization name, what forms come to mind?
6) In what ways does organization name collect and/or find information, insights, and perspectives from the community?
7) Can you give an example of when community knowledge been valuable to organization name? When was it least valuable? Why? What have you gained?

Core Questions – Strategic Directions of CF

8) What would you say is the strategic direction of organization name?
9) How was this direction determined? What informed it?
10) Who is usually involved in the process?

Core Questions – Obtaining and Classifying Community Knowledge

11) Does <u>organization name</u> have a formal process through which community knowledge makes its way into decision-making? If so, what does it look like? If not, what's an ideal process?
12) What forms or types of community knowledge does the foundation engage with? How are they distinguished from each other?
13) What is the relationship between community knowledge and professional/academic knowledge for <u>organization name</u>? Is there a difference?
14) Are some community knowledge more valuable than others? What are the criteria or process for evaluating that?
15) Has there been a time when community knowledge was misleading or unhelpful?
16) When there are disagreements on how a piece of community knowledge is interpreted between staff, Board, etc. How is it reconciled?

Core Questions – Community Knowledge in Practice

17) Can you share an example of a time where you went looking for community knowledge. What was your first step? Who did you talk you? How did it play out?
18) When you or staff receive an insight from a community member, how is that information shared with others at the foundation? What's the process look like?
19) Describe a time when community knowledge you received conflicted with the foundation's strategy or direction? How was the tension resolved?
20) How do you navigate insights from a specific group in the community that may not represent the broader community's experiences or perspectives? How do you navigate it?

Ending Questions

21) Is there anything I did not ask that you hoped I would about community knowledge and how it's leveraged in CFs that you feel is important for me to know and understand?

Closing Script

Thank you again for taking the time and for the insights that you shared with me. I've learned a great deal and feel that this interview will support a lot of what I'm researching. I'd like to remind you that the data recorded today will be kept secure and will only be used for the intended purpose of informing my thesis. You are welcome to request a copy of the recording and transcript as well.

If you have any questions that come up or want to chat further about anything that has come up during our interview, please don't hesitate to reach out to me. Once my thesis is completed and successfully defended, I'd be happy to share that final paper with you.

Wrap Up Activities

- Write reflection memo
- Save recording in secure digital location
- Send thank you to participant

Appendix 3, Recruitment Email Template

Email Invitation to Participant

Subject: Invitation to Participate in Master's Research: Leveraging Community Knowledge in BC Community Foundations

Dear First Name,

My name is Vincent Tom, and I am a Master of Arts in Community Development candidate at the University of Victoria. I am inviting you to participate in my thesis research titled: **"Leveraging Local Wisdom: Community Knowledge in the Strategic Direction of British Columbia's Community Foundations."** My research is being conducted under the supervision of Dr. Susanne Thiessen.

Community Foundations play an increasingly vital role in supporting and shaping communities. My research aims to explore how Community Foundations in British Columbia, like yours, understand and utilize community knowledge to inform their strategic decisions and priorities. Your experience and insights as a [senior leader/board member/former board member] within a Community Foundation are invaluable to this study, as they can shed light on the nuances of how local wisdom is interpreted and integrated into organizational strategy.

What Your Participation Would Involve:

Should you choose to participate, I would ask you to engage in a **semi-structured interview** lasting approximately **60 minutes**. This interview will be conducted conveniently via Zoom or phone. During our conversation, we will discuss how community knowledge is understood and used in your foundation's strategic direction and any factors that influence this process. With your permission, the interview will be audio-recorded for transcription and accuracy.

Benefits of Your Participation:

Your contribution will directly help to:

- Advance the understanding of how Community Foundations in BC specifically leverage community knowledge.
- Inform best practices for integrating local insights into strategic planning within the philanthropic sector.
- Provide a platform for your experiences and perspectives to contribute to a growing body of knowledge that can benefit other Community Foundations and the communities they serve.

Voluntary Participation & Confidentiality:

Your participation in this study is entirely voluntary. You are free to decline to answer any question or to withdraw from the interview at any time, without any penalty or impact on your current or future relationship with your organization or the University of Victoria.

Privacy Statement:

All information you provide will be treated with the strictest confidence. Your name and any directly identifying information will be removed from transcripts and research materials. Pseudonyms will be used in the results of this research to ensure anonymity. Audio recordings will be transcribed and then securely stored. All research data will be stored on a password-protected and encrypted institutional server at the University of Victoria, accessible only by me for the duration of the research. Any raw data related to the research will be deleted one year after the defence of this research. Additionally, any analysis data will also be deleted one year after the defence. As a participant, you can request access to your recordings and/or interview transcripts.

Next Steps:

Attached to this email, you will find a detailed **Research Brief and Consent Form** that provides comprehensive information about the study, including ethical considerations, data handling, and my contact details.

If you are interested in learning more or would like to participate, please reply to this email at your earliest convenience. I am happy to answer any questions you may have before deciding.

Thank you for considering this invitation. I look forward to the possibility of speaking with you.

Sincerely,

Vincent Tom – vincetom@uvic.ca
MA in Community Development Candidate
School of Public Administration
University of Victoria

Supervisor
Dr. Susanne Thiessen - sthiesse@uvic.ca

Appendix 4, Consent Form

University of Victoria

Participant Consent Form

School of Public Administration

Leveraging Local Wisdom: Community Knowledge in the Strategic Direction of British Columbia's Community Foundations

Who is conducting the study?

You are invited to participate in this study: Leveraging Local Wisdom: Community Knowledge in the Strategic Direction of British Columbia's Community Foundations.

This study will be conducted by Vincent Tom, a graduate student in the Department of Social Sciences at the University of Victoria. Vincent can be contacted by email at vincetom@uvic.ca

As a graduate student, Vincent will conduct research as part of the requirements for a Master of Arts in Community Development. This research is being conducted under the supervision of Dr. Susanne Thiessen, who can be contacted by email at sthiessen@uvic.ca

As this research is being conducted with individuals within the community foundation sector in the province, it is worth sharing that the Vancouver Foundation currently employs the researcher. While the Vancouver Foundation may have an existing working relationship with your organization, please be assured that this research is being conducted entirely in the capacity of a student researcher at the University of Victoria. This work is informed by the researcher's time working in the philanthropic sector, but it is not part of any employment duties, nor is it endorsed, directed, or influenced by the Vancouver Foundation.

Your decision to participate in the study or withdraw from the study will have no bearing or impact whatsoever on any existing or future relationships with the Vancouver Foundation. All data collected will only be used for the purposes of this research, and nothing beyond that without your consent.

What is the purpose of this study?

This study will explore how community foundations access, interpret, and leverage community knowledge to inform how they prioritize and direct their strategic work with their respective communities. This study is important because community foundations rely on community insights and experiences to inform the way that their work is carried out. Exploring this relationship and how it influences decision-making within the foundation will support transparency and accountability in the ways that they engage with their communities. Additionally, the research landscape regarding community foundations in the Canadian context remains limited. This research will contribute to the growing body of knowledge articulating the sector's work.

You've been invited to participate in this study because you are an individual in a [senior leadership capacity/board member] within a community foundation in BC. Your insights and experiences are exactly what this study needs to better understand the relationship between community knowledge and how community foundations use it to guide their work.

It's your choice whether or not you want to take part in this study. Your participation is voluntary.

If I choose to take part in this study, what will I do?

If you take part in this study, you will:

- Attend an interview where you will be asked questions related to how you access, interpret, and leverage community knowledge in your organizational work. Your responses will be kept confidential, and the dissemination of the results will be kept anonymous.

The interview will be conducted through Zoom and recorded for transcription and accuracy. Notes may be recorded during the interview as well. All of this collected data will be part of an analysis process and assembled into a thesis paper, which will be shared with you once successfully defended. Any recorded data can also be shared with you as requested.

You do not have to answer any questions that make you feel uncomfortable.

How long will this take?
The interview is intended to take about one hour of your time over Zoom.

What are the possible harms and discomforts?
There are no known risks associated with taking part in this study.

What are the possible benefits of taking part in this study?
Although you may not benefit directly from the study, the results may surface benefits that support how the philanthropic sector in BC engages and works with the communities they serve. The sector remains under researched, with many unknowns about how CFs operate alongside communities. Participation will contribute to growing the body of knowledge related to the BC philanthropic sector.

Who will see my information?

- Data collected will be locally stored on a password protected computer housed in Vincent's private residence. Additionally, a backup of any recordings and notes will be stored on the University of Victoria's servers through the OneDrive platform. All working files will also be password protected in their respective storage locations.
- Any data containing identifiers will either be removed or pseudonyms will be used to avoid breaking the confidentiality of the participant. In some cases, data will be amalgamated, lowering the risk of disclosure. There are, however, limits to confidentiality. For example, if an existing participant refers a potential participant or if participants openly disclose their involvement.
- All data will only be accessible by Vincent during the duration of the research.
- Data collected will be retained for one year post-thesis defense. At which all paper records (notes, memos, etc.) will be shredded, and all audio, analysis, and other digital files deleted.

How will the study results be share

Findings from this study will be shared with you after a successful thesis defense and housed digitally on the University of Victoria "*UVicSpace*" where it will be publicly available.

Please note:

You may end the interview at any time.

You may ask to remove a statement shared from the record.

You may ask for a copy of the recording and/or transcripts from the interview.

You may change your mind and withdraw from this study at any time. There is no need to explain why you have changed your mind.

If you withdraw from the study, you will be asked for permission to use your contribution in the analysis and final report of this study. You may agree or refuse this request without explanation.

Each time you complete a research activity and meet with Vincent, you will be reminded that your participation in the study is voluntary and asked if you wish to continue to take part.

If you have any questions or if you would like to discuss this study further, please contact the researcher at vincetom@uvic.ca or 604-616-8238

You can also contact the Human Research Ethics Office at the University of Victoria at 250-4724545 or ethics@uvic.ca, to check the ethical approval of this study, or to raise any concerns you might have.

Please remember that participation in this study is voluntary.

Consent:

I have read this consent letter………………………………………………………………......yes…….no
I have had the opportunity to ask questions...……………..…………………………..........yes…….no
I understand that my participation in this study is voluntary ……………….......yes……no
I understand that I can withdraw my consent at any time……………………….......yes…….no
I agree to take part in the study……...……………………..………………………..……………...yes…….no
I agree to have my interview recorded………………………………..……………………….yes…….no

Name of Participant	*Signature*	*Date*

Please retain a copy of this consent letter for your records

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