The London School of Economics and Political Science

Costs and Benefits of Goal Advancement:
Organisational Sustainability in LGBT NGOs in Post-Same-Sex Marriage Canada

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Declaration

I certify that the thesis I have presented for examination for the MPhil/PhD degree of the London School of Economics and Political Science is solely my own work other than where I have clearly indicated that it is the work of others (in which case the extent of any work carried out jointly by me and any other person is clearly identified in it).

I declare that my thesis consists of 86,275 words.

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> During the course of writing, I made the decision to move from London back home permanently to Toronto. The first wave of COVID-19 was ending, UK air travel

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Abstract

What happens when organisations get what they want? How do external shifts which advance organisational goals affect survival? Existing literature on goal advancement tends to conceptualise it as a normatively 'good' thing and focuses on how to attain it. What remains undertheorised is how organisations can paradoxically create problems for themselves when they get what they want. This puzzle is particularly important to understand vis-à-vis the third sector and policy change, as states increasingly rely on nongovernmental organisations (NGOs) for social policy provision. Insofar as 'getting what you want' via policy change can have unintended consequences for organisational sustainability, it has direct implications for social policy, governance, and the communities these NGOs serve. Despite its growing policy relevance, however, this puzzle remains understudied. This doctoral thesis fills this gap by examining the case of LGBT NGOs in Calgary, Montreal, and Toronto in the context of long-term same-sex marriage legalisation, a policy change widely seen as socially and politically progressive for LGBT equality and one advancing LGBT NGO goals. Drawing upon organisational management, development management, resource dependence, and organisational ecology literatures, this policy-relevant thesis advances scholarly understandings of organisational continuity.

Across city cases, I find that structural forces, organisational factors, and policy shift shape resource availability, resource mobilisation, and resource dependencies. But LGBT NGOs are not simply acted upon, instead exercising agency through adaptive behaviour—illustrating this, I introduce a new concept of *organisational hibernation*, an adaptation to resource scarcity or an evolving policy domain to maintain continuity. But not all adaptations are beneficial: in the post-marriage political economic context, adaptations made for immediate persistence may negatively impact the sustainability of the LGBT NGO sector. Goal advancement via policy change can be costly with broader impacts for continuity of policy provision and LGBT interest representation in policy processes. This thesis contributes to debates in social policy, NGO studies, LGBT politics, and Canadian politics.

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Abbreviations

NGO – nongovernmental organisation

EDI – equality, diversity, and inclusion (issue area)

IRI – immigration and refugee issues (issue area)

Action Plan – Government Action Plan against Homophobia and Transphobia

BLCHT – Bureau de lutte contre l'homophobie et la transphobie

1. Introduction: What Happens When Organisations Get What They Want?

What happens when organisations get what they want? What might be the unintended consequences of advancing organisational goals? This puzzle is salient across most types of organisations, pointing to the dilemma in which getting what you want might prove costly in the end. In other words, developments which are seemingly beneficial to the organisation may in fact be regressive. This is illustrated in examples amongst state, market, and third sector organisations:

On the state side, policies created for the public benefit may instead backfire. In 1998, the Supreme Court of Canada ruled that people are legally required to disclose their HIV status before having sex in cases where sex posed a "significant risk of serious bodily harm" (CATIE, 2020). Those who do not disclose their HIV status to their sex partners could be charged with and convicted of aggravated sexual assault—even if there is no intent of harm (CATIE, 2020). While the intent was to protect public health in Canada, this law has resulted in several unintended consequences, especially as the context in which it was written does not necessarily reflect medical advances in HIV treatment and prevention and it is left to judges and prosecutors to determine what constitutes a "realistic possibility" of HIV transmission (CATIE, 2020). Illustrative of this, people have been charged and imprisoned even when the risk of transmission was negligible (CATIE, 2020). Moreover, fear of prosecution can have adverse impacts on public health: people may be deterred from getting tested, knowing their HIV status, or seeking HIV treatment, as these records can be used as evidence in court of knowing one's HIV status and not disclosing it before sex (CHLN, 2019). After all, one cannot disclose their HIV status if they are unaware of it.

In the market, businesses have long known that while selling the best possible and most durable product would be a testament to their calibre, it might not be desirable. Selling products that last 'too long' would result in fewer repeat customers, lower profits, fewer jobs, and fewer products that respond to evolving consumer demands (Hadhazy, 2016). Adverse impacts for business profitability, the labour market, and consumer choice are the logics behind 'planned obsolescence,' in which products such as smart phones, computers, light bulbs, and even children's clothing have deliberately short lifespans (Hadhazy, 2016).

In the third sector, advocacy groups and political parties have similarly struggled with the implications of getting what they want. In 2015, the US Supreme Court struck

down state bans on same-sex marriage, paving the way for same-sex couples to marry and have their marriages recognised across the country. The American Foundation for Equal Rights shut down not long after the ruling, acknowledging in a farewell email to supporters that the specific mission they had been formed to do—"arguing for marriage equality before the US Supreme Court and to, while doing so, dramatically advance the American conversation on equality"—had been accomplished (Riley, 2015). After achieving a 'pinnacle' right, LGBT[1] advocacy in the United States had lost a major player.

Elsewhere, the Marijuana Party of Canada got what it wanted when recreational cannabis use was legalised in Canada in 2018. But while the legalisation accomplished a key part of its platform, it also resulted in overly-cautious regulations in a new policy arena. What followed were restrictive policies around the public and private use of recreational cannabis, the sale of it, and stiff penalties for breaking the law—subsequent developments which are counter to the Party's goals and which make it more difficult to achieve its vision of a more liberal regulatory environment for cannabis use and sale. In anticipation of legalisation, for instance, the City of Calgary passed a bylaw prohibiting cannabis consumption in public spaces (Himpe, 2018). The province of Nova Scotia sought to regulate even the private consumption of cannabis by granting landlords new authority to ban tenants from smoking cannabis (Lagerquist, 2018).

Across the pond, after the successful 2016 'Brexit' referendum vote paved the way for Britain to leave the European Union, the UK Independence Party (UKIP) came face to face with an existential crisis after one of its primary goals was achieved. In the wake of achieving Brexit, party support has declined amongst membership and the electorate, and it struggles to gain a platform or publicity for its remaining issues (Oaten, 2018; Payne, 2018). Beyond perceptions of mission accomplishment, however, Brexit produced another major unintended consequence for UKIP: the emergence of a new competitor, the Brexit Party, formed out of frustration with the government pace around finalising Brexit. Sharing overlap in political ideology, the Brexit Party threatens to take up the space of right-wing populist politics currently occupied by UKIP. Coupled with declining party support following Brexit and being unable to successfully reinvent itself, UKIP's survival is seriously in question (Walker, 2019; Payne, 2018).

[1] I elaborate on page 46 my decision to use the term 'LGBT' in this thesis rather than another variation of the term.

These empirical examples offer glimpses into what might happen when state, market, and third sector organisations get what they want: there may be unintended consequences for organisational sustainability and for wider society. It also offers a glimpse into how policy change might result in organisations getting what they want and precipitate such unintended consequences. But just *how* does advancing organisational goals—and especially vis-à-vis policy—affect the organisation to potentially compromise survival and produce wider societal impacts? What are the pathways to these processes and outcomes? How might we explain this paradoxical dynamic? This constitutes the *research puzzle* that is the focus of this doctoral thesis.

Understanding this puzzle matters for social policy. Third sector organisations increasingly play an important role in policy and governance in the neoliberal era by providing social and human services typically associated with the welfare state, facilitating the interest representation of marginalised communities in the policy process, and creating spaces for civic and social action (Smith & Phillips, 2016). Insofar as policy change and 'getting what you want' can have unintended consequences for the sustainability of such nongovernmental organisations (NGOs), it has direct implications for social policy, governance, and the communities these NGOs serve. This underscores the pressing need for this research, especially for NGOs serving marginalised communities such as LGBT people who are underrepresented in the policy process and frequently face greater social, economic, and health inequalities than the general population (Egale, 2020). For such communities, the importance of NGO sustainability is compounded.

Yet, the role of goal advancement in organisational persistence remains underexplored (Hildebrandt, 2018; Hager et al., 1999; Seibel, 1996). Existing literature on goal advancement tends to conceptualise it as a normatively 'good' thing and focuses on how to attain it (Helmig et al., 2014; Lecy et al., 2011; Nigam, 2018; Grimes et al., 2019; Etzioni, 1964). There remains a gap in our understanding of how 'getting what you want' can produce adverse consequences for organisational sustainability, especially in the context of policy change advancing NGO goals.

One plausible reason for this gap is that few individual NGOs or groups organised around substantive social policy issue areas—such as housing, poverty, development, etc.—achieve all or some of their aims. This is particularly salient in fields where goal attainment is hindered or made more difficult by structural factors—for instance, NGOs working in fields such as poverty alleviation, migration, access to housing, or climate change. For NGOs in these fields, achieving the ultimate goal—that is, 'solving' the policy

problem—is far off. Goal attainment takes such forms as incremental legislative change, program development, policy implementation, stakeholder representation in the policy process, and even getting issues onto the policy agenda—in other words, smaller achievable goals on the path to the ultimate goal but which have far less impact than obtaining the ultimate goal. As such, goal attainment in these cases is unlikely to have much adverse impact on organisational persistence.

Instead, the negative effect of goal attainment on organisational livelihoods in the context of policy has been observed among NGOs and groups organised—either wholly or initially—around more 'discrete' policy issues rather than broad social policy issue areas/fields. In addition to the examples mentioned above—specifically the Marijuana Party of Canada successfully advocating for the legalisation of recreational cannabis, UKIP achieving its Brexit goal, and marriage equality NGOs achieving same-sex marriage or same-sex domestic partnerships—ultimate goal attainment is also observed among advocacy groups such as the International Campaign to Ban Landmines, the Women's March organisation in the United States (which I discuss further in Chapter 3), and ad hoc local-level parent advocacy groups campaigning against education policies such as modernised sexual education in Ontario (e.g., Concerned Parents of Peterborough, Parents Alliance of Ontario—see Harris, 2018; Anderson & Clysdale, 2019). In these examples, once the organisation achieved the discrete policy issue that formed its raison d'être, continued organisational survival is made more difficult and may not be desired. In addition to it being a discrete policy issue, achieving the ultimate goal in these cases may have also been relatively within reach (i.e., politically and structurally feasible—not far off).

This doctoral thesis expands our understanding of how goal attainment can negatively impact survival. It does this by examining the case of LGBT NGOs in the context of long-term same-sex marriage legalisation, a policy change widely seen as socially and politically progressive for LGBT rights, equality, and wellbeing and one advancing LGBT NGO goals. Given that LGBT NGOs have diverse roles in the third sector and across multiple areas of focus, this case study provides an opportunity to better understand this research puzzle with respect to the third sector and organisations more broadly. The findings of this thesis are therefore relevant to understanding goal attainment in NGOs/organisations pursuing discrete policy change (either wholly or initially), with relevance to NGOs/organisations where missions evolved from discrete policy issues to substantive policy areas (e.g., LGBT NGOs pursuing marriage equality and then expanding

their mission focus upon goal attainment). They may be most relevant in policy domains where the policy goal is within reach (politically and structurally feasible), and less relevant to NGOs in policy domains where the ultimate goal is far off—such as in poverty alleviation, migration, access to housing, or climate change.

To note, there are two interrelated components to this research puzzle: the *empirical puzzle* and the *theoretical puzzle*. Empirically, it is puzzling that organisations can create problems for themselves when they get what they want. On one level, I seek to understand this empirical puzzle: what are the types of problems that can arise when external events advance organisational goals? Specifically, what are the types of problems that can arise when policy changes advance organisational goals? On another level, I seek to explain this paradoxical dynamic and how organisations navigate it. What are the factors that make it possible? This is the theoretical puzzle. Together, the empirical and theoretical components comprise the research puzzle of interest in this thesis.

This doctoral thesis makes several key contributions to the study of social policy, organisations and NGOs, and LGBT politics. Using same-sex marriage as a case study, it illustrates the potential negative impacts of social policy that is seemingly beneficial to society. Notably, it will advance an organisational approach to the critical study of social policy by studying NGOs as routes to uncover the wide-ranging intended and unintended impact of social policy on marginalised populations, civil society, dominant discourses, and wider society, and vice versa. This study further highlights the importance of understanding the impact of social policy on NGO sustainability, thus answering the call for greater research in this area given the growing importance of the third sector to social policy (Smith & Phillips, 2016). Further contributing to research on organisations and NGOs, this thesis seeks to advance debates around organisational continuity, resource dependence, and the implications of goal advancement for continued persistence. It aims to build new theory in the study of organisational continuity on how groups may negotiate resource dependence, survival, and selection in an evolving environment. Finally, this doctoral thesis offers empirical and theoretical insight into what might happen to LGBT movement and organisational politics long after same-sex marriage has been achieved, building theory around the direction of post-marriage LGBT politics.

In this thesis, I use the terms ‘survival,’ ‘persistence,’ ‘continuity,’ and ‘sustainability’ interchangeably to refer to the continued active state of the organisation (i.e. ‘organisational survival’). My use of ‘continuity’ to refer to survival does not presume stasis. Nor does my use of ‘sustainability’ refer to issues or practices of environmental

sustainability, or the sustainable use of resources (human, financial, or otherwise) as it pertains to the organisation. Instead, my use of these terms refers to deliberate organisational behaviour geared towards the continued pursuit of the organisation's stated mission or goals. As such, the group's level of activeness may vary over time but insofar as it meets these conditions, it remains an active organisation—one which continues to 'survive.'

Moreover, the assumption in this thesis is that organisations seek to survive and that the actors within the organization undertake actions which are intended to benefit persistence—whether or not this materialises in the outcome. As a theoretical and conceptual note, I recognise that not all organisations pursue survival as a goal from their founding, during their maturation, or at all. I elaborate upon this in the next chapter.

This thesis will proceed as follows: in Chapter 2, I will first provide a definition for NGOs in this thesis and review the NGO and civil society literature, as well as social movement literature, before turning to the literatures I suggest are best suited to understanding the research puzzle: organisational management, development management, resource dependence, and organisational ecology. These literatures form the theoretical framework in this thesis. I will highlight the strengths and theoretical gaps in these latter bodies of scholarship in understanding what happens when organisations get what they want. These gaps will base the research question in this thesis. Drawing from my review of the literature, my empirical findings, and policy scholarship, I will outline the conceptual and analytical frameworks guiding my empirical analysis. I will also preview the novel concept I offer in this thesis, *organisational hibernation*, which describes how small organisations might adapt to periods of resource scarcity and an evolving environment in order to remain an active organisation.

In Chapter 3, I outline my research design and methodology. I will construct a comparative case study research design of *diverse crucial* cases, situating and rationalising the case of LGBT NGOs in the context of three Canadian cities: Calgary, Montreal, and Toronto. Drawing from my data, a scan of LGBT organisation websites, and publicly available NGO financial information, I will provide an empirical overview on the organisational context of LGBT NGOs in Calgary, Montreal, and Toronto. This offers empirical context for my research design and sets the stage for my empirical analysis. I will then discuss in-depth the qualitative methods used to collect and analyse my data for this thesis. I outline the sample, my interview method, and thematic analysis method, as well as anonymisation of interview participants and ethical issues. Finally, I will discuss

the generalisability of my findings and limitations to this, providing empirical examples to demonstrate the possible range of contexts in which my thesis findings may offer useful insights to similar phenomena elsewhere.

In Chapter 4, I examine the impact of structural forces on organisational continuity. These structural forces include societal factors such as regionalism and individual donor behaviour; state factors such as the role of the state as a major funder, geographic and political scale, and bureaucratic inertia; and market factors such as the role of corporate donors as funders, the organisational desire for corporate funding, the corporate desire to fund LGBT organisations, and the ethics and politics of corporate funding. I illustrate how opportunities for government and corporate funding are embedded in the regional political and economic context but are moreover shaped by regional sociocultural norms. This challenges prevailing scholarly assumptions about the role of regionalism in shaping social and political processes in urban areas. Notably, I illustrate the benefits of bureaucratic inertia in state organisations and state-sponsored organisations, challenging dominant scholarly assumptions that inertia is necessarily counterproductive in the policy process. In the context of long-term policy change, I show how structural forces independent of and related to policy shift are thus shown to act upon LGBT organisations and affect resource dependence, resource availability, resource mobilisation, and thus sustainability.

In Chapter 5, I discuss the impact of policy change itself on the organisation, demonstrating how policy advances which organisations are in favour of may affect the sustainability of those very same groups. I show how policy change can affect organisational development, prompting the formation of 'specialist' groups, the expansion of more 'generalist' groups, and the death or near-death of other groups. This adds to our understanding of the role of policy change in organisational life cycles. I also show how policy change can affect the organisational mission, causing missions to 'drift' or embrace 'new' regional spaces or issues, and strategic behaviour to balance the size of the mission with available resources. I will additionally explore how policy change can impact the availability and sustainability of organisational members, creating new problems for organisational capacity. In some cases, expansions in citizenship and possibilities for the life course have unintended consequences for organisational capacity and thus survival. These problems exacerbate the pressures exerted by structural forces, heightening resource dependencies.

Yet, I illustrate that NGOs are not simply acted upon—in Chapter 6, I demonstrate how organisations exercise their agency to adapt to the survival pressures created by

structural forces, policy shift, and organisational factors after long-term policy change. I explore adaptations to the organisational mission, form, features (e.g. name) and frames, funding strategies, and their regular operational levels. I introduce a novel concept of *organisational hibernation* to show how small volunteer-run organisations might adapt to resource scarcity or an evolving policy domain in order to maintain continuity. I also offer a conceptualisation of organisational inertia as a potentially beneficial adaptation to persistence and one which demonstrates agency rather than a lack thereof, thereby challenging existing scholarly understandings of the concept. This concept and conceptualisation seek to build new theory and advance debates in organisational continuity.

Yet, while undertaken to better the odds of survival, adaptations may be counterproductive to the organisation and sector. Demonstrative of this, I show how such *maladaptations* may impede organisational persistence, contribute to visible decline, or make continued survival nearly impossible. In this vein, I present a case for thinking about how the NGO pursuit of a continuous cycle of short-term funding with the goal of financing an ever-expanding and more complex project of LGBT equality may in and of itself be counterproductive for the LGBT NGO sector. These adaptations and maladaptations show how policy change can affect a range of organisations in different ways—and how organisations might strategically respond to navigate the structural and organisational forces of a changing policy domain.

To conclude, in Chapter 7 I return to the research puzzle which is the impetus for this doctoral study: what happens when organisations get what they want? I outline the implications of my findings for LGBT NGOs, theory, and social policy. I then present some final thoughts which might provide avenues for future research.

2. Theoretical, Conceptual, and Analytical Frameworks

In this chapter, I review the literature best suited to understanding my research puzzle. Drawing upon this literature, I present the theoretical, conceptual, and analytical frameworks which will guide the empirical analysis in this thesis. To help understand my research puzzle, I present my overarching research question which I investigate in this thesis.

In this thesis, I explore my research puzzle by focusing on an organisational case of interest: NGOs in the context of policy change. As such, I first provide a definition of NGOs in this thesis. I then review the scholarship frequently used to study NGOs: NGO and civil society literature, as well as social movement literature. While these respective literatures provide pertinent insights into organisational persistence, they have ultimately been overused in the study of NGOs. Thus, to generate new insights to contribute to the study of NGOs, I turn to organisational management, development management, resource dependence, and organisational ecology as primary literatures to build my theoretical framework. In reviewing these literatures, I highlight the strengths but also the theoretical gaps in understanding what happens when organisations get what they want. These gaps are the basis for my research question, which I subsequently present to help understand my research puzzle in the context of NGOs and social policy.

To guide the analysis in this thesis, I next offer an overarching conceptual framework to interpret how policy change affects organisations, as well as a conceptual framework to understand how policy change might affect the organisational mission. I preview the concept of 'organisational hibernation,' a new contribution I offer in Chapter 6 to the scholarly analysis of organisational continuity. Finally, drawing upon my theoretical and conceptual frameworks, I outline my analytical framework which underpins and organises my empirical analysis.

Organisational Survival

As mentioned in the previous chapter, the assumption in this thesis is that organisations seek to survive and that the actors within the organization undertake actions which are intended to benefit persistence—whether or not this materialises in the outcome. As a theoretical note, I recognise that not all organisations pursue survival as a goal from their founding, during their maturation, or at all. For instance, ad hoc organisations convened for a specific short-term purpose such as the election of a political candidate; production of special social, political, or cultural events; or to advocate for a specific regulatory change

are intendedly short-lived. In this brief, non-exhaustive list of illustrative examples, the lifespan of the organisation is tied to the singular goal of the organisation: once the goal is achieved, the organisation disbands.

While many NGOs seek to survive because they pursue broad social goals that tend to have long time horizons—as is the focus in this thesis—this is also not always the case. For instance, in the case of ad hoc disaster relief organisations which emerge following the disaster event, the sole purpose is to address new needs created by the crisis (Kapucu & Van Wart, 2006). These informally organised NGOs—that is, groups with little or no institutionalised structure—are established with the understanding that they will disband when they are no longer required (Campbell, 2010). They are intended as a 'short-term' solution to a 'short-term' problem. Examples include search and rescue groups and groups raising funds to support disaster victims and their families which formed after the 9/11 terror attacks, Hurricane Katrina, and the Indian Ocean earthquake and tsunami (Campbell, 2010).

It is also possible for organisations to not initially pursue long-term survival as a goal. Organisations may have an intendedly short temporal period at organisational founding, during which long-term survival may not be pursued—for instance, because it may not be desired or it may not be attainable. As I elaborate in Chapters 4 and 6, HIV organisations are a case of NGOs which were founded with a short-term purpose with the intention of disbanding after achieving their goal. Due to the death rate of HIV/AIDS at the start of the HIV/AIDS epidemic, long-term NGO survival was never a goal at organisational founding (Interview 65). But as the epidemiology of HIV changed and living with HIV became a reality, the purpose of HIV NGOs changed (Interview 65). This is one factor explaining why long-term survival became a goal amongst many HIV NGOs over the course of organisational maturation. In Chapter 4, I explore policy-related factors facilitating survival amongst these groups.

It is also possible for organisations to pursue survival but not consistently. Organisations may intend to pursue survival at founding, but during maturation this goal may no longer be attainable and thus no longer pursued. Celebrity chef David Chang (2020) suggests in his memoir *Eat a Peach* that his restaurant Momofuku—now a global chain—only succeeded (and indeed survived) because it abandoned its founding goal of survival. While he intended for his restaurant to survive at its founding, the financial outlook was so poor that survival no longer seemed possible. Having only three months of financing available enabled the restaurant's team to be open to failure, because the 'worst'

possible scenario was already upon them: the reality of organisational closure. As Chang (2020) describes, the freedom to fail enabled the restaurant to try options they might never have considered if they knew they would be in business for more than 90 days, such as scrapping vegetarian options and not allowing guests to make substitutions. With the ability to throw out the restaurant playbook, Chang's Momofuku restaurant managed to chart its own path to long-term survival, profit, and expansion. Long-term survival later became an attainable reality precisely the restaurant did not expect to survive during its maturation stage and thus abandoned its initial founding goal of long-term persistence.

These counterfactuals illustrate that not all organisations and not all NGOs seek long-term survival initially, consistently, or at all. They may have an intendedly short life span commensurate with the time horizon of their ultimate goal. Or they may have an intendedly short temporal period at their founding or during their maturation period: in other words, long-term survival may not initially be an organisational goal but it becomes a goal over time; or long-term survival may be a founding goal but is abandoned over time (and then perhaps returned to). Furthermore, the goal of survival may not be equally pursued across the organisation. Actors within the organisation may be differently invested in the survival of the organisation and disagree over whether the organisation 'should' survive.

Indeed, while the NGOs interviewed for this thesis all identified survival as an organisational goal, this does not necessarily mean that all of these NGOs pursued survival as a goal consistently or at their founding. As I later elaborate, HIV NGOs did not initially pursue a goal of long-term survival at their founding but did so over time. However, for all interviewed NGOs, survival was a present goal. Thus, it is important to note that while survival is considered a given in this thesis, especially from the perspective of organisational ecology and resource dependence theories, the concept of organisational survival is much more complex.

Defining 'NGOs' in this Thesis

In this thesis, I use the broad term 'NGOs' to refer to organisations situated in the intermediate space between the state and market (Billis, 2010). In this broad conceptualisation, NGOs play multiple roles. They can engage in service provision, advocacy, program partnership, member-serving associational activity, or a combination of all of these functions (Lewis, 2014). They may also act as vehicles for interest

representation, especially for marginalised groups, feeding the demands and concerns of societal groups to the state (Bartelson, 2006; Laforest, 2009; Teets, 2013).

Importantly, there is a structure to these organisations in that there is an organisational reality to them rather than being an ad hoc collection of individuals or informal gatherings (Salamon, 1996). This organisational reality is defined by having an organisational name, mission statement, and a set of roles assigned to organisational members. NGOs in this thesis are self-governing and organisational participation is voluntary (i.e., not coerced or mandatory).

The definition of NGOs in this thesis is an umbrella category for the multiple types of organisations which exist in the intermediate space between state and market. Provided that they meet the structural-operational definition set out above, this conceptualisation includes nonprofit organisations, which Salamon (1996) defines as having some formal structure, being organisationally and structurally separate from the state, does not distribute profit amongst organisational members or directors, is self-governing, and voluntary. Such nonprofit organisations can be registered or non-registered. My definition of NGOs moreover includes: registered charities, which are 'public benefit' nonprofit organisations with legal tax-exempt status; churches and religious groups, many of which are considered tax-exempt charitable nonprofit organisations in Canada and the United States; foundations, which channel financial resources to organisations which carry out programs or deliver services (Salamon, 1996); social enterprises, which are socially-oriented organisations which use a 'business' source of revenue (Kerlin, 2010); professional organisations such as chambers of commerce, boards of trade, and professional or business associations; as well as social organisations, which Salamon (1996) defines as a member-serving association organized around common social and extracurricular interests (e.g., hobbies); and mutual organisations—member-serving associations where profits are distributed amongst members for collective benefit (e.g., cooperatives).

Indeed, my conceptualisation of the NGO sector is similar to Evers and Laville's (2004) conceptualisation of the third sector in which the peripheries of the third sector overlap with the state and market, denoting areas where NGOs may resemble government or market organisations. Unlike Salamon's (1996) model of nonprofit organisations, Evers and Laville's (2004) third sector model does not place a constraint on profit distribution amongst NGO members, instead including mutual aid societies and cooperatives alongside registered charities and other nonprofit groups in a broader social economy. In this European model, the third sector is part of a mixed economy of welfare, situated between

state, market, and informal communities and economies (e.g., households), where these spheres are not necessarily clear-cut but overlapping at the edges; there is greater analytical attention to the political embeddedness of the third sector, specifically the tension between roles as an 'alternative' to state-based services and an expression of civil society; and the function of third sector organisations may differ across political jurisdictions, contingent upon the type of welfare state (Evers & Laville, 2004; Evers, 2008, 1995; Alcock & Kendall, 2011; Billis, 2010).

In this thesis, the third sector model allows for a conceptualisation of organisational development in NGOs (Alcock & Kendall, 2011), especially where these organisations serve specific communities. Such organisations include mutual aid or self-help organisations vital to the development of local communities, as well as social enterprises, both of which distribute profit amongst members. These organisational forms may exist alongside not-for-profit groups such as charities or registered nonprofit organisations or may constitute different phases of organisational development over the life course of the NGO. All of these organisations are considered NGOs in this thesis.

To be sure, the term 'non-governmental organisation' does tend to have certain connotations. It tends to be applied either to third sector organisations that work internationally or those active in developing countries (Lewis, 2014). Indeed, the designation of 'NGO' was historically given to international non-state organisations awarded consultative status in UN activities. However, as there is no legal definition of NGO and it has been defined broadly—as "any non-profit entity without significant government-controlled participation or representation" (OECD, 2011, p. 6)—I use this term as an umbrella designation to refer to the organisations previously outlined in this section. What I refer to as NGOs in this thesis may be referred to elsewhere by different scholars as third sector organisations, voluntary organisations, or social economy organisations (Lewis, 2014). Importantly, while NGOs can work towards social, political, economic, or regulatory goals—as illustrated above by the types of groups included under the NGO umbrella, including chambers of commerce and boards of trade—my focus in this thesis is on NGOs which pursue social goals.

It must also be noted that there are also different types of NGOs, whereby their funding sources (as a strategic decision at organisational founding) structure or influence different actor behaviour. In the humanitarian arena, Dunantist NGOs (named for Red Cross founder Henry Dunant) do not seek funding from government and tend to pursue long-range projects and approaches (Hasmath et al., 2019). Wilsonian NGOs (named for

US President Woodrow Wilson) seek to project national norms and values in their activities and tend to pursue short-term projects and activities, a feature of project-based government funding. There is a strong principal-agent component in Wilsonian NGOs' relationship with the government: NGOs act as agents to deliver services and government therefore has significant control over the NGOs' use of funds and may decide to withhold funding if NGOs do not act in accordance with their expectations (Chauvet et al., 2015; Barnett., 2005). This allows for government control or influence on NGO programming and service delivery, and at best may limit NGO autonomy by incentivising them to act in ways which stray from their core values (Dreher et al., 2007). Largely due to differences in funding structures, Dunantist NGOs are generally more confrontational in their approach towards government, while Wilsonian NGOs generally develop more cooperative relationships with government, preferring to deliver policy advice through a 'softer' and behind-the-scenes approach (Stoddard, 2003; Hasmath et al., 2019).

While these specific categories of Dunantist and Wilsonian NGOs are applicable to the humanitarian context of foreign aid (Jolkkonen, 2019; Adami, 2019; Cusumano, 2019; Hasmath et al., 2019; Goodhand, 2013), they also point to broader patterns of donor influence on NGO behaviour which can be observed elsewhere. Ranucci and Lee (2019), for instance, find that the type of funding heavily determines the capacity for nonprofit organisations to pursue long-term product innovation. Ishkanian (2014) finds that neoliberal shifts in government policies influence the progressive policy-shaping activities of women's organisations which rely heavily on government funding, incentivising shifts in advocacy strategies that contradict their organisational values. Eikenberry (2007), Ostrander (2007), Barman (2007), and Eikenberry and Kluver (2004) observe the growth of donor control through models of workplace giving and private philanthropy, with knock-on impacts to the nonprofit groups on the receiving end of these funds and for the potential for transformative civil society action more broadly. These themes of donor influence on NGO activity will be explored throughout this thesis but especially in Chapters 4 and 6, where I illustrate that different types of funding allow for varying levels of latitude in pursing NGO mission and activities. In some cases, they may seriously affect what NGOs identify to be social problems and the extent to which NGO activities reflect donor (i.e., state) values.

As I discuss in Chapter 4, government-organized NGOs are another analytical category of NGOs which come into play in the ecological environment of LGBT NGOs. GONGOs look like voluntary associations but are financed largely by government sources

and demonstrate varying degrees of government influence (Pifer, 1967). Created to respond to new, complex problems in society, GONGOs may be thought of as somewhat autonomous social arms of the state, providing specialised services and offering independent judgement (Hasmath et al., 2019; Skjelsbaek, 1971; Pifer, 1967). GONGOs are organised by government and selection of their leaders is influenced by government, though the strength of their ties to government can vary over time (Hasmath et al., 2019). They are therefore ultimately dependent upon and answerable to government, and therefore do not possess the level of autonomy of traditional NGOs (Pifer, 1967). The proximity of GONGOs to the state can result in their statements, actions, and interpretations being viewed as non-objective, as they typically reflect government values and beliefs (Hasmath et al., 2019). As I discuss in Chapter 4, GONGOs have the potential to influence the lives of NGOs through their role as government-sponsored arms' length funders. They may also play a peripheral role but create expectations for funding through their symbolic but policy-focused role.

A Brief Review of the Existing Scholarship on NGOs: NGO and Civil Society Literature and Social Movement Literature

In this section, I discuss the literatures that have been utilised elsewhere to study the case I use to examine my research puzzle: NGOs. NGOs have been frequently examined using the NGO and civil society literature. In the scholarly vein of de Tocqueville (2002 [1889]) and Putnam (2000), key debates are centred around the role of civil society, and thereby NGOs, as a normatively 'good thing' to cultivate democratic norms, act as a check on state power, and ensure processes of good governance (Suleiman, 2013; Ghosh, 2009; Diamond, 1994; Clarke, 1998; Hadenius and Uggla, 1996). Gramscian perspectives posit that as a space for organised collective action located outside of the state and market, civil society is a contested space reflecting competing interests, power struggles, and the divisions within wider society (Gramsci, 1971; Wood, 1997; Pearce, 2010; van Rooy, 1998). Reflecting elements of both traditions, scholars have examined how the purported transformative potential of NGO activities and civil society is circumscribed by broader structural factors such as development paradigms and neoliberal governance (Ishkanian, 2014; Milbourne & Cushman, 2013; Hasenfeld & Garrow, 2012; Alvaré, 2010; Bebbington, 2005). While much of the literature is underpinned by a liberal democratic assumption regarding the role of civil society and therefore of NGOs (Lewis, 2002; Mercer, 2002), elsewhere scholarship

has examined the capacity of NGOs to strengthen rather than undermine the authoritarian state (Spires, 2011; Hsu & Hasmath, 2014; Hildebrandt, 2013). Scholars have also theorised the limits of the civil society concept to capture the role of a predatory state and the complexity of non-Western associational life (Frewer, 2013; Heinrich, 2006; Lewis, 2002; Maina, 1998).

Relatedly, NGOs have also been studied using social movement literature. The social movement literature focuses on the mechanisms of mobilisation, the structures and processes of social movement organisations, the opportunities and constraints in the political environment enabling and structuring collective action, and the outcomes and consequences of collective action (Tilly, 1998; Tarrow, 1996; McAdam et al., 1996; Kriesi, 1995). Seminal concepts such as Tarrow's (1996) typology of political opportunity structures have been useful in examining NGOs in contexts with narrow political or economic opportunities for persistence, such as authoritarian regions where the state looms large (Spires, 2011; Hildebrandt, 2013; Chua, 2012). Scholars have examined what happens when social movements achieve their goals, exploring outcomes such as partial goal fulfilment, political polarisation, and social movement continuity and death (Gamson, 1968; McVeigh et al., 2014; Taylor, 1989; Giugni, 1998; Voss, 1996; Lee et al., 2020; Jacobsson & Sorbom, 2015). However, as critics note, grand theories of mobilisation and opportunities tend to focus on static relationships and to overemphasise the significance of opportunities, which are more important to severely repressed movements and less important to middle-class movements (Jasper, 2010, 1997; McAdam et al., 2001).

To be sure, my analysis of NGOs in this thesis naturally engages with concepts from the social movements and NGOs and civil society literatures. This includes concepts such as resource mobilisation, a key concept in both social movement and organisational theory literatures (McAdam & Scott, 2005; McCarthy & Zald, 1977), and the multiple roles of NGOs in areas of advocacy, service provision, and as 'conveyer belts' for the interest representation of marginalised groups (Lewis, 2014; Bartelson, 2006). However, as these literatures have already been heavily used to examine NGOs, they will not be the primary literatures I use to inform my theoretical and analytical frameworks in this thesis. Instead, to generate new insights to contribute to the study of NGOs, I turn to bodies of scholarship which have been less utilised to examine themes of interest in my research puzzle: organisational and development management literatures, as well as organisational theory.

Theoretical Framework: Organisational Management and Development Management Literatures

To better understand my research puzzle and to generate more novel insights, I turn to organisational management and development management scholarship as primary literatures to form the theoretical framework guiding my empirical analysis. My rationale for using development management literature draws upon the definition of 'human development,' conceptualised by the United Nations Development Programme to refer to interventions which seek to improve human wellbeing by expanding the opportunities available to people and their capacity to take up these opportunities (UNDP, 2015). NGOs play a central role within the human development approach as conduits for societal action and community capacity-building. Using the human development definition, development and thus development management are applicable and relevant concepts to Global North contexts in addition to Global South contexts generally associated with development. This literature is especially useful to examining NGOs.

Organisational management and development management literatures examine the attainment of organisational/programmatic outcomes and processes such as goal or mission achievement, performance, continuity, success, and failure (Helmig et al., 2014; Nigam, 2018; Brown & Slivinski, 2006; Vlachos et al., 2009; Grimes et al., 2019; Lecy et al., 2011; Seibel, 1996; Meyer & Zucker, 1989; Meyer, 1999; Anheier & Moulton, 1999; Mosse, 2005). To do so, studies in this literature focus on the aspects of organisational structure and process: organisational characteristics and processes such as organisational behaviour, capacity, resources, leadership, culture, change, inertia, legitimacy, accountability, and organisational development in business organisations, social organisations such as NGOs, government organisations, and development programs (Meyer & Höllerer, 2016; Huang et al., 2013; Geiger & Antonacopoulou, 2009; Batley & Rose, 2011; Lewis et al., 2003; Schein, 1985; Amburgey et al., 1993; Haveman, 1992; Ossewaarde et al., 2008; Knutsen & Brower, 2010; Najam, 1996; Lewis, 2014; Lester et al., 2003; Greiner, 1998; Mosse, 2005; Simon, 1945; Selznick, 1957).

Importantly, in delineating the foci of these literatures, I do not suggest that concerns about organisational structures and processes are not taken up in other literatures. As McAdam and Scott (2005) note, there is crossbreeding of ideas between the study of organisations and of social movements, where social movement scholars have adopted analytical concepts of organisational structure and organisational scholars have adopted concepts of process in their analyses. But organisational management and development

management literatures ultimately contain a more pronounced focus on the complexities of organisational structure and processes. This micro-level focus on the components and dynamics which make up the organisation itself is naturally- and best-suited to understand both what it means for organisations to get what they want, and might happen to the organisation when it gets what it wants. This makes these bodies of scholarship particularly useful to examine my puzzle.

Unidimensional Approaches: End Objectives as 'Success'

In organisational management and development management literatures, 'getting what organisations want' can be understood in functionalist terms. This refers to the outcomes which constitute getting what organisations want. Getting what organisations want is frequently conceptualised as organisational success, and can be measured on one or more variables. As Helmig et al (2014) note, the achievement of the organisational mission may be seen as the "ultimate indicator" of success for NGOs, as they seek social goals embedded in their missions (p. 1511; see also Sawhill & Williamson, 2001; Brown & Slivinski, 2006). Business organisations are mainly judged in terms of profit maximisation, but may also be judged on measures such as corporate social responsibility (Vlachos et al., 2009; Scherer & Palazzo, 2008).

However, organisations may pursue multiple competing goals, which may in turn be difficult to articulate, measure, or decide which goal is the indicator of success (Nigam, 2018; Miles, 1980; Robbins, 1987). Nigam (2018) notes how the presence of multiple stakeholders in health care organizations may lead to the pursuit of competing goals, ultimately hampering organisational effectiveness and leading to subsequent inter-personal blame amongst different groups of stakeholders. Moreover, publicly articulated goals may not match actual goals (Ossewaarde et al., 2008; Katz & Kahn, 1966). This is especially the case for NGOs, where goal clarity and measurement are made more difficult insofar as NGOs pursue broad social missions (Ishkanian, 2014; Herman & Renz, 1997; Kanter & Summers, 1994). Ossewaarde et al (2008), for instance, find that the need for humanitarian INGOs to demonstrate progress towards achieving their missions results in an overemphasis on counting tangible outputs such as the number of relief items distributed and beneficiaries reached. However, the link between achievement of tangible output goals and broad social goals is tenuous. Moreover, to demonstrate use of resources, INGOs may articulate large program commitments different from actual goals and which prove to be unrealistic—practices which have consequences for organisational credibility (Ossewaarde

et al., 2008). Relatedly, concerns for attainability and donor/revenue constraints may cause NGOs to deviate or 'drift' from their original missions, producing organisational actions which audiences may perceive to be at odds with the organisation's image and goals (Grimes et al., 2019; Jones, 2007; Conforth, 2014). These factors therefore make it difficult to ascertain whether organisations have achieved what they want.

Multidimensional Approaches: End Objectives and Means Objectives as 'Success'

However, Lecy et al (2011) find that there is a broad consensus in the literature on NGO effectiveness that unidimensional measures of effectiveness, such as goal attainment or mission accomplishment, are not useful despite being commonly used. Thus, in addition to goal attainment, success may also be measured as a multi-dimensional concept for which end objectives such as mission accomplishment are weighed in conjunction with means objectives (Lecy et al., 2011; Herman & Renz, 1997). Means objectives might be thought of as performance measures and include the ability to acquire and utilise means such as resources (Etizioni, 1964; Goodman & Pennings, 1980). Yet, management practices, competing individual interests, factionalism and power distribution amongst actors, and the organisational culture of norms and values all converge, affecting the ability of the organisation to acquire and use resources efficiently (Gregory et al., 2009; Schein, 1985; Quinn, 1988; Helmig et al., 2014).

Means objectives also include the ability to maintain relations with the environment, including stakeholder relations. Lewis (2014) outlines a framework for strategically managing NGO relationships, locating factors which lie largely within the control of the organisation and those which do not: NGOs can control organisational processes such as budgeting and setting objectives; influence external elements such as other NGOs, donors, media, and government; and only appreciate wider political and economic structures, and the technological environment. A key component of success is in prioritising these relationships for effective organisational management. For NGOs, managing stakeholder relations runs into complexities around multiple stakeholders with competing lines of accountability (Lewis, 2014; Ebrahim, 2003; Knutsen & Brower, 2010; Edwards & Hulme, 1995; Ossewaarde et al., 2008). Echoing findings by Ossewaarde et al (2008), Knutsen and Brower (2010) find that in balancing multiple accountabilities, satisfying 'instrumental' accountabilities to those who demand and those who fund NGO services may come at the expense of 'expressive' accountabilities to organisational mission and values.

Together, end objectives and means objectives constitute what organisations want and are also tools to achieving it. In my theoretical framework, I draw upon issues around end objectives and means objectives to examine the organisational factors affecting the opportunity structure for NGO survival.

Interpretivist Approaches: 'Success' as a Constructed Narrative and Interpretation

But who decides whether an organisation gets what it wants? Interpretivist approaches highlight the way in which the subjective interpretation of organisational actions and events can collectively signal the notion of success. Here, an organisation gets what it wants only when it is labelled as such by its stakeholders, who may be internal and/or external to the organisation (Hildebrandt, 2018; Bovens et al., 1999; Anheier & Moulton, 1999). From an interpretivist standpoint, success is a socially constructed narrative rather than a measurable outcome. In the context of development programs, Mosse (2005) posits that success is contingent upon establishing a compelling interpretation of organisational actions and events and linking a wider network of supporters to them, thereby establishing the legitimacy of the organisational success. Being able to sustain this interpretation of events is crucial.

To construct and sustain these interpretations, organisations may rely on the ambiguity of measures and organisational jargon. Meyer and Höllerer (2016) show how corporations may resort to intentionally vague, malleable concepts such as 'shareholder value' and 'corporate social responsibility' to satisfy competing demands, thus strategically producing ambiguity to construct narratives of corporate effectiveness. These interpretations are subsequently sustained through social processes and have mass 'buy in' from supporters and a public audience (see McAdam, 1996, and Snow & Benford, 1988; Goffman, 1974). But the impact of the success narrative extends beyond the audience of external stakeholders. For instance, Vaara (2002) finds that discursive constructions of success can have sociopsychological impact within the organisation: corporate framing of mergers and acquisitions as successes can lead to overly optimistic views on the management's capacity to control these processes. In my empirical analysis, I draw upon interpretivist concerns of constructing narratives of success to examine NGO adaptations.

External Shifts and Unintended Consequences: Moving Beyond Normative Concepts of 'Success' to Understand Organisational Progression

In these functionalist and interpretivist approaches of success, getting what organisations want is generally framed in the organisational management and development management literatures as a normatively 'good thing.' Attaining goals, achieving missions, and being interpreted as 'successful' on a variety of outcome and performance-related measures are generally treated as inherently desirable for the organisation. Less research has focused on the unintended consequences of organisations getting what they want.

In fact, indicative organisational management and development management scholarship on NGOs shows how achieving key measures of success may be counterproductive to the organisation in the long run. Seibel (1996) shows how being too efficient can attract unwanted public visibility for the organisation. This is a problem for NGOs working in sensitive areas with difficult-to-achieve goals such as preventing violence against women and integrating people with disabilities into the workforce (Seibel, 1996). In these cases, greater visibility would draw more attention to the complexities of the problem with the unintended effect of revealing how far the NGO is from ever addressing it (Seibel, 1996). As a means objective for success, being too efficient becomes a problem for the organisation. Similarly, Hager et al (1999) find that success via mission accomplishment may lead to organisational closure amongst registered charities.

But as Hildebrandt (2018) shows, achieving measures of success may not be the problem in and of itself. Doing the job well enough or attaining prominent goals may help produce larger structural shifts that are problematic for the organisation. For instance, sufficiently declining HIV infection rates provided the impetus for major inter-governmental donors to cease funding to HIV NGOs in China (Hildebrandt, 2018). While the downward shift in the HIV epidemic is what HIV NGOs sought and helped to achieve, it resulted in a major shift to the economic landscape of HIV prevention with the closure of key funding opportunities (Hildebrandt, 2018). Similarly, the magnitude of the 2011 repeal of the 'Don't Ask, Don't Tell' policy in the US—which had banned openly gay, lesbian, and bisexual service members from serving in the US military—was such that survival became precarious for some LGBT organisations (Hildebrandt, 2018). This included the Servicemembers Legal Defense Network, a pro bono legal services and advocacy NGO for LGBT service members and veterans. While the repeal of 'Don't Ask, Don't Tell' achieved a prominent NGO goal, it did not achieve its mission. Yet, the repeal represented a major progressive policy shift for LGBT rights in the US. With a landmark victory attained, supporters' interest in the organisation waned as external donations declined steeply, putting the NGO in financial crisis (Brydum, 2013).

Revealing a gap in the organisational management and development management literatures, these examples moreover show that getting what organisations want cannot be reduced to normative concepts of 'success,' whether unidimensional, multidimensional, or interpretivist. It is not only success, but an external shift more broadly which can advance an organisation's stated goals, producing both beneficial and regressive outcomes for the organisation. Using a case study of LGBT NGOs in the context of same-sex marriage policy progress, this thesis seeks to fill this theoretical gap, thus contributing to the organisational management and development management literatures in this area. In particular, this thesis builds upon the work of Hildebrandt (2018), Seibel (1996), and Hager et al (1999) by extending the debate on the unintended effects of organisations getting what they want.

Further, the above examples suggest that such large-scale external shifts affect organisational trajectories, putting organisational sustainability at risk. The organisation may lose credibility, its mission may lose relevance, resources may dry up, and organisational capacity may be negatively affected. But what happens next? What happens *after* organisations get what they want, when survival is threatened? How do organisations survive external change which advances their goals? Resource dependence and organisational ecology literatures are well-suited to understand this part of my puzzle.

Theoretical Framework: Resource Dependence and Organisational Ecology

To understand the theoretical context of organisational survival, I turn to resource dependence and organisational ecology literatures within organisational theory. Drawing parallels to living organisms in nature, both perspectives conceive of the organisation as primarily motivated by survival. By exploring the conditions governing survival, organisation-environment interactions, and how organisations navigate these in the interests of continued persistence, these bodies of scholarship provide a robust understanding for the implications of organisations getting what they want. I review these bodies of scholarship here as they pertain to concepts relevant to organisational survival.

Organisational Survival in Resource Dependence

Survival and maintaining it are key components of resource dependence theory. In Pfeffer and Salancik's (1978) seminal work, they argue that as a coalition of resources, the organisation survives insofar as it can acquire and maintain resources in a competitive

environment. Such resources come in the form of economic resources (e.g. funding, perceived economic value), political resources (political power), human resources, and legitimacy. Organisations are fundamentally reliant on acquiring resources from external actors and entities but also those internal to the organisation. The entities which control the resources necessary for sustainability have power over the organisation (Pfeffer, 1980). Moreover, where resources are scarce, the organisation's resource dependent relationship may become problematic.

Further integral to understanding the 'how possible' of survival is adaptation. Central to resource dependence is the idea that the organisation is not at the mercy of the environment. Organisations survive by adapting: adjusting to and coping with the environment (Pfeffer & Salancik, 1978). However, not every external pressure will affect the organisation; the organisation may not be aware of the threat (information asymmetry) or be isolated or buffered from its effects (Pfeffer & Salancik, 1978). But at baseline, organisations have the capacity for strategic choice in evaluating the external threat and can to a certain degree manipulate the organisation or the environment (Oliver, 1991; Pfeffer & Salancik, 1978; Aldrich & Pfeffer, 1976; Zald, 1970). This suggests a primary role for agency—the agency of the organisation as a whole and those who comprise the organisation—in how organisations interact with their environment. However, agency is bounded by power relations and competing priorities within the organisation, which have the potential to shape how organisations respond to external threats (Zald, 1968, 1970). In other words, power and politics within the organisation, individual and group decision making, and the agency of individual actors affects the adaptive pathways that organisations undertake in response to their environment—ultimately affecting their survival (Pfeffer, 1980; Aldrich & Pfeffer, 1976).

But while survival may be a primary goal of the organisation, resource dependence theory does not presume that it is necessarily a 'good' outcome for the organisation or the sector in which it operates. When organisations evade death—that is, all indications suggest they 'should' die but they do not—power relations in the sector are more easily institutionalised (Pfeffer, 1980). In other words, there is a 'natural' lifespan for each organisation in the ecosystem, beyond which continued persistence becomes a liability for the collective and the sector. The point at which survival becomes a liability may be decided by Pfeffer and Salancik's (1978) concept of organisational effectiveness. Organisational effectiveness is an external standard of the acceptability of the organisation and its activities as judged by groups upon which it is dependent, such as consumers and

government (Pfeffer & Salancik, 1978). Different from efficiency, the measure of organisational effectiveness is centred around the perceived 'usefulness' of what the organisation does and the resources being consumed by the organisation (Pfeffer & Salancik, 1978). In other words, survival may be judged based on perceptions of continued instrumental utility.

More recent scholarship deploys resource dependence to understand NGO-environment relations and NGO behaviour (Lefroy, 2017; Mitchell, 2014; Khieng & Dahles, 2015; Wang & Yao, 2016; AbouAssi, 2014). Mitchell (2014) explores the types of strategies that transnational NGOs use to respond to resource dependence and the threat of external control. Strategic responses such as subcontracting, diversification, and specialization allow NGOs to resist external donor control, with the potential to influence donor preferences (Mitchell, 2014). Similarly, in the Cambodian context, Khieng and Dahles (2015) examine how NGOs may turn to commercial activities as a source of revenue to alleviate resource dependence. However, the traits that make social enterprises more self-sufficient to survive resource constraints do not necessarily make them adept at pursuing the social goals of an NGO, and may cause mission drift (Khieng & Dahles, 2015; see also Hildebrandt, 2015). Elsewhere, Wang and Yao (2016) present a compelling case for how resource dependence might be used to examine NGO-government relations in the authoritarian Chinese context, a potentially fruitful approach which avoids the pitfalls of over-focusing on state or society. My thesis adds to this body of scholarship. Concepts of resource dependence, resource mobilisation, adaptation, organisational power and politics, and the pitfalls of evading organisational death are key components of my theoretical framework. In my empirical analysis, they form the basis for understanding the organisational factors which affect the opportunity structure for survival, the adaptive capacities of organisations to survive, and the potential negative implications of long-term sustainability.

Organisational Survival in Organisational Ecology

However, a critique of resource dependence is that it tends to overemphasise the role of organisational learning and adaptation in organisational persistence (Hannan & Freeman, 1977). To complement this, organisational ecology highlights a more critical approach to adaptation: adaptation is riskier than resource dependence suggests, and may not occur as frequently or readily as assumed. Organisational ecology also attributes greater attention to

the structural conditions shaping organisational survival (Baum & Singh, 1994; Singh, 1990).

Population ecology is the earliest and most recognised form of organisational ecology (Singh & Lumsden, 1990). It uses concepts derived from evolutionary biology to interpret how organisations behave in response to its environment. Fundamentally, organisations are seen to operate in an environment that is resource-finite. Accordingly, the environment has a carrying capacity, or a limit on how many organisations it is able to support; this necessitates organisations competing with each other for resources in order to survive (Hannan & Freeman, 1977; Hawley, 1950). Those which are 'less fit,' or less equipped to deal with the changing environmental pressures, are 'selected out' by the environment (Aldrich & Pfeffer, 1976; Hannan & Freeman, 1984). Those which survive continue to persist because they possess certain qualities which are favoured during specific periods of environmental pressure (Hannan & Freeman, 1977). It is these common, pre-existing structural features in the surviving organisations which account for why organisations in an environment begin to look and behave more similarly to each other (Hannan & Freeman, 1977; Hawley, 1950; DiMaggio & Powell, 1983). Organisations with other diverging traits and forms have been selected out.

Further, in population ecology, adaptation is possible but not undertaken as frequently as resource dependence theory would suggest. The costs of adapting are high, with potential implications for organisational credibility and the draining of limited resources; thus, organisations adapt rationally—that is, they make a determination as to whether the benefits of adapting outweigh the costs (Hannan et al., 2006; Hannan & Freeman, 1977). As a result, some organisations will choose to adapt more often than others and undergo a process of more gradual structural change (Amburgey et al., 1993; Lamberg et al., 2009). Others will decide that the costs of adapting outweigh the benefits. As a result, they tend to progress along a path of relative structural stability until faced with a survival-threatening crisis, at which point they decide they must adapt or die (Haveman, 1992; Hannan & Freeman, 1984). Yet, adaptations do not guarantee sustainability—they may be maladaptive, putting the organisation in a more precarious position immediately, or in the long-run in exchange for short-term benefit (Singh, 1994).

A later variation of organisational ecology, organisational evolution focuses on how organisations emerge, change, and survive and the role of structural conditions and interorganisational interactions in these processes (Baum & Singh, 1994). Organisations are 'imprinted' with the contextual and environmental conditions present at the time of

organisational emergence, where these conditions affect adaptation and survival over the organisational life course (Tucker, Singh, & Meinhard, 1990; Stinchcombe, 1965). Natural selection and adaptation are both integral to producing the types of organisational forms and practices which replicate to successive generations (Baum & Singh, 1994). This causes certain traits—not all of which are beneficial—to persist in organisations and populations over time (Baum & Singh, 1994). Interorganisational interactions may aid persistence: competing organisations may engage in mutually beneficial behaviour to weather the storm (Freeman, 1990; Lune, 2002). Competition and mutually beneficial behaviour are likeliest to occur between organisations which do similar things (Baum & Singh, 1994).

Recent scholarship has used organisational ecology to generate novel insights in the development and continuity of NGOs, INGOs, and organisations in health and media sectors. Yu (2016) uses organisational ecology in conjunction with social movement theory to explain the rise and development of HIV NGOs in China. In a similar vein, Dupuy et al (2015) examines the impact of restrictive public regulatory laws on the behaviour and survival trajectories of foreign-funded NGOs in Ethiopia. Bush & Hadden (2019) operationalise the ecological concept of population density (Hannan & Freeman, 1977) to understand rates of INGO formation in the US and globally. Elsewhere, Vest and Menachemi (2019) and Lowrey (2017) use an organisational ecology perspective to examine the emergence, development, and future of organisations in information exchange and fact-checking in health and media sectors. Previously, Chambré and Fatt (2002) explored the effect of crisis imprinting on New York City HIV/AIDS service organisations. They argue that weak organisational infrastructure—the product of rapid organisational growth, urgent crisis response, and inexperienced leaders—hampered the ability of organisations to efficiently use funds to attract new sources of funding.

Competitive Boundaries, Resource Dependencies, Survival, and Selection: Using Resource Dependence and Organisational Ecology to Generate New Insights into NGO Sustainability

Ultimately, resource dependence theory offers a robust theoretical understanding of how factors such as resource dependence, resource acquisition and exchange (i.e. resource mobilisation), agency, power and politics, internal decision-making, and adaptive behaviour shape the organisational capacity to survive. It also offers a non-normative understanding of survival, drawing attention to the negative implications of organisations evading death. Organisational ecology highlights how features of the wider environment

affect successive populations of organisations through processes like natural selection, adaptation, and imprinting. In its treatment of adaptation, it offers insights useful to the study of NGOs into why adaptation may not occur until it is too late. Together, earlier and later variations of organisational ecology provide a more nuanced conceptualisation of adaptive capacities, adaptive behaviour, and the implications of this. These theoretical insights I have identified from both resource dependence and organisational ecology will inform how I approach survival and adaptation in my empirical analysis.

Importantly, I note that while there are many types of resources—such as power, legitimacy, human resources, and human capital (i.e., knowledge)—my focus in this thesis is primarily on financial resources. Specifically, my focus is on funding with respect to NGOs. Thus, my reference to resources generally refers to funding unless otherwise specified. Further, unless otherwise specified, when I refer to resource dependence and resource mobilisation, I am referring to the dependence of these organisations on funding and processes to acquire more funding.

To note, while I refer to survival, adaptation, the environment, and ecological concepts such as imprinting throughout this thesis, my theoretical framework is not purely based on organisational ecology. Rather, it draws from both resource dependence and organisational ecology, where the former theory analytically highlights processes of resource dependence, agency (individual and organisational), and internal organisational dynamics, and the latter theory highlights external structural forces and adaptation to them. In drawing upon both theories, my conceptualisation of survival and adaptation in this thesis is heavily informed by the emphasis on agency highlighted by resource dependence. That is, survival and adaptation in this thesis are not processes which are determined primarily by the environment as organisational ecology might suggest. Rather, through a resource dependence lens, I conceptualise and operationalise survival and adaptation processes as being guided by structural forces but also crucially shaped by the agency of the organisation.

Organisational agency is defined in this thesis as the agency of the organisational unit and refers to the capacity of the organisation to exercise actions with the intent of producing a particular outcome vis-à-vis the environment in which it operates. In addition to external factors (such as other organisations, institutions, and structural forces), organisational agency in and of itself is shaped by factors within the organisation, including the agency of individual actors (i.e., the individual capacity of people within the organisation to exercise actions with the intent of producing a particular outcome vis-à-vis

the organisation), power and politics, and decision-making processes. In other words, individuals within the organisation ultimately impact upon organisational direction, strategy, adaptation, and survival. Of course, individuals with greater power in the organisation may have greater latitude in this process. Thus, organisational agency does not necessarily reflect the agency of all actors which make up the organisation—it is not the sum of individual interests. Individuals within the organisation may disagree with the actions and direction of the organisation, which may disproportionately reflect the interests of those in power in the organisation. In short, organisational agency is shaped by the agency of individuals within the organisation (though not necessarily all), and internal organisational dynamics such as power, politics, and competing interests.

Agency is integral to how I approach adaptation and survival in this thesis. The agency of the organisational unit is fundamental to the organisational capacity to engage in processes of resource mobilisation, adaptation, and survival. This conceptualisation draws upon resource dependence and institutional literature within organisational studies in order to understand organisational behaviour. Institutional theory emphasises the influence of state, societal, and cultural pressures on organisational behaviour (Oliver, 1991). While institutional theory can overemphasise the role of the environment in 'determining' organisational behaviour (DiMaggio & Powell, 1983), this is not always the case. In this vein, organisations are not passive recipients of environmental influences, but instead have the power to reshape it within the limits in which they operate (i.e., the constraints of the environment) (Child, 1972). They seek to 'manage' their environments (Aldrich & Pfeffer, 1976). Organisational actors can interpret, manipulate, and change the limits and opportunities surrounding them; they can adapt to the situation, shape it, or avoid it (Batley & Rose, 2011; Aldrich & Pfeffer, 1976). Ultimately, there is a degree of choice that organisations have in acting upon their operational environment (Oliver, 1991).

It is therefore my contention in this thesis that when organisations adapt or respond to environmental pressures, this is not necessarily a reflection of passive behaviour dictated by the environment. Adaptations can be reactive to environmental threats or proactive to these threats. Proactive adaptations exist at the more active end of the adaptation continuum, anticipating and seeking to circumvent environmental threats before they happen. Reactive adaptations exist at the less active end of adaptation, where these adaptations occur as a reaction to environmental threats that are in the process of occurring or which have already taken place. At the furthest end of the adaptation continuum, a reactive adaptation is one undertaken when the organisation does not act until it is too late,

resulting in organisational survival being compromised. The organisation does not act until external conditions (e.g. institutional conditions) change, responding to these shifts after they have happened. At the opposite furthest end of the adaptation continuum, a proactive adaptation seeks to shift the basic functions, goals, and operations of existing institutions, effectively changing the rules of the game.

But regardless of why the organisation is making the adaptation (i.e., for proactive or reactive reasons), the capacity to choose and to act, even within a limited sphere of possible action, reflects agency in action. This is a fundamental assumption in my operationalisation of adaptation in this thesis. Agency is therefore presumed in my discussion of these processes in this thesis and my references to agency with respect to the organisation moreover presumes the role of individuals within the organisation in impacting organisational action, adaptation, and survival. When organisations engage in processes of resource mobilisation, adaptation, and survival, agency is at work.

Of course, in highlighting the analytical importance of agency with respect to NGOs, I reiterate that other theories of analysis could be used to understand my puzzle of organisational survival. Indeed, while I draw upon institutional theory, I draw upon only a small subset of the literature as it is useful to conceptualising the role of agency in organisation-environment interactions, especially in relation to adaptation. Institutional theory could be used to a greater degree to examine my puzzle. Existing research has fruitfully used institutional theory to examine NGOs with respect to themes such as state-NGO relations (Hasmath & Hsu, 2015; Hasmath & Hsu, 2014; Hsu, 2010); market-NGO relations with respect to entrepreneurialism and corporate social responsibility (Rahman et al., 2019; Doh & Guay, 2006); community/society-NGO relations (Maclure, 2003; Paarlberg & Meinhold, 2011; Mussari & Monfardini, 2010); NGO behaviour and practices (Paarlberg & Meinhold, 2011; Wellens & Jegers, 2011; Maclure, 2003; Abzug & Galaskiewicz, 2001; Miller-Millesen, 2003); and NGO emergence and survival (Zhang & Fulton, 2019; Tam & Hasmath, 2015; Hager et al., 2004).

As discussed earlier in this chapter, civil society theories could have also been used, as they highlight the capacity of NGOs to engage in transformative civil society action and how NGO agency is circumscribed by factors such as competing interests, power struggles, societal divisions, and competing civil society paradigms (i.e., the role of civil society and the role of NGOs within it). Social movements theories could also have been used, as they highlight mechanisms of mobilisation and the structures, opportunities, and constraints in the operational environment which structure collective action. However,

while I draw upon concepts from civil society literature, social movements literatures, and institutional theory, these literatures have already been heavily used to examine NGOs. As such, to generate new insights to contribute to the study of NGOs, I do not primarily draw upon these literatures.

Instead, I primarily turn to both resource dependence and organisational ecology, as there remains little research jointly drawing upon resource dependence and organisational ecology to examine the survival of NGOs. As Hillman et al (2009) note, little research (Hildebrandt, 2015; Ulrich & Barney, 1984) has focused on the role that resource dependence relationships play in processes of survival and selection. What also remains underexplored in organisational ecology is how external changes which advance organisational goals have the potential to affect the competitive and survival trajectories of a range of organisations. This thesis seeks to fill these gaps. It seeks to add to resource dependence and organisational ecology scholarship, specifically on NGOs, by combining components of each theoretical tradition to examine how NGOs respond to the survival pressures of getting what they want and the wider implications of this. In doing so, it builds upon and extends the work of Mitchell (2014), Khieng and Dahles (2015), Hildebrandt (2015), and Chambré and Fatt (2002). This approach answers the call to integrate other theoretical lenses such as organisational ecology with resource dependence theory as a way of producing new insights into the relationship between organisations and their environment (Hillman et al., 2009).

Research Question

Thus far, I have examined the literatures best suited to understanding my research puzzle: organisational management, development management, resource dependence, and organisational ecology. Together they form the theoretical framework that guides my empirical analysis. To understand my research puzzle, I situate it in the context of NGOs and policy change—specifically LGBT NGOs and same-sex marriage policy, as I elaborate in greater detail in the next chapter. Based on the theoretical gaps I have identified in understanding organisational progression (e.g. moving beyond normative concepts of success) and organisational survival in the organisational management, development management, resource dependence, and organisational ecology literatures, I derive the overarching research question which will provide insight into my research puzzle. In this

thesis, I examine the following research question: *How does progressive policy shift affect organisational survival?*

In this thesis, a policy shift is considered 'progressive' to an organisation insofar as it appears to advance one or more of the organisation's stated goals. In other words, the organisation appears to 'get what it wants.' Granted, various stakeholders internal and external to the organisation will have differing views on whether the policy shift indeed advances the organisation's stated goals. In this thesis, the policy shift must objectively align with one or more of the organisation's stated goals in order to be considered to advance those goals.

Importantly, the notion of progression in this thesis pertains to organisational progression—that is, progress with respect to an organisation's stated goals—rather than normative notions of social or political progress. While the policy case study used to examine progressive policy shift in this thesis is that of same-sex marriage legalisation, an ostensibly socially progressive policy, the notion of progressive policy shift is also applicable to organisations working towards normatively 'bad' or socially regressive policy developments (i.e. those which restrict human rights or social mobility). In this thesis, I refer to progressive policy shift interchangeably as 'policy shift,' 'policy change,' and 'policy progress.'

Conceptual Framework

Overarching Conceptual Framework: How Progressive Policy Shift Affects Organisations in a Policy Domain

The overarching conceptual framework guiding this thesis is one of *how progressive policy shift affects organisations in a policy domain*. This draws from my review of the literature, my empirical findings, and the concept of the policy domain. This conceptual framework outlines how external progression affects organisational progression in this thesis. It offers a way of thinking about what it means for organisations to get what they want and the immediate and wider impacts of this as it pertains to the policy context.

According to Burstein (1991), a policy domain "is a component of the political system that is organized around substantive issues" (p. 328). The issues that define a policy domain share substantive characteristics which influence how they are framed and negotiated—for instance domains exist around substantive issues such as energy, health, and transportation policy (Burstein, 1991). A policy domain contains organisations

concerned about the set of substantive problems and which take each other into account as they define policy problems, develop policy options, and work for their adoption (Lubell, 2007; Laumann & Knoke, 1987). It is a cultural construct around which organisations and individuals from the public sector, private sector, and third sector structure their actions (Carmin et al., 2012; Burstein, 1991). In Burstein's (1991) conceptualisation, the policy domain is a tool used to understand the process leading to the legislative enactment of policy change, focusing on agenda-setting, policy development, and the adoption of these policy proposals. In policy studies and scholarship on organisations, other terms have been used to describe the concept of the policy domain, such as 'policy subsystem' (Baumgartner & Jones, 2009; Weible & Sabatier, 2009; Freeman, 1985), 'policy area' (Amenta & Carruthers, 1988), and broadly an 'organisational field' (McAdam & Scott, 2005; DiMaggio & Powell, 1983).

In this thesis, I use the concept of the policy domain, first, to delineate the space in which NGOs working on a substantive policy issue are situated; and, second, to outline why we might expect progressive policy shift to affect the NGOs working in this space. As I have earlier discussed, I conceptualise a progressive policy shift in this thesis as one which appears to advance one or more of the organisation's stated goals. In my conceptual framework, a progressive policy shift affects the entire policy domain. It affects all organisations working in a policy domain in different ways and to differing degrees, whether or not they work towards similar goals or compete directly with one another. By virtue of being located in the same policy domain and thus focused on the same set of substantive policy issues, all organisations in the policy domain are affected, including those that helped bring about the shift and those that did not. Progressive policy shift has the potential to affect the competitive trajectories of organisations, redrawing or making fuzzier the boundaries of competition such that groups that were previously non-competitive in relation to each other are pitted against each other. It also has the potential to make organisations more resource dependent, thus affecting survival trajectories.

This conceptual framework is crucial to my empirical analysis. In this thesis, I focus on how policy shift affects NGOs situated in the LGBT policy domain, a broad policy domain where organisations address and represent LGBT issues and serve LGBT communities

Conceptual applicability beyond policy shifts and policy domains: As I show in Chapter 4, policy shift may also affect the government and private sector organisations in the LGBT policy domain, with implications for NGOs. My conceptual framework may

therefore be generalisable to contexts beyond policy shifts and NGOs to understand how an external shift which advances the goals of organisations working in a common substantive area has the potential to affect these groups in a range of ways and to differing degrees. In the next chapter, I present the set of empirical and theoretical contexts to which my thesis findings might be generalisable.

'Organisational hibernation': As I show in this thesis, policy shifts which organisations are in favour of have the capacity to pose a sustainability risk for these very same groups. To illustrate how organisations might strategically respond to the pressures created by progressive policy shift in conjunction with structural factors such as sociocultural, political, and economic forces, I introduce a new concept of *organisational hibernation*.

'Organisational hibernation' describes adaptive behaviour undertaken to maintain organisational continuity during periods of resource scarcity or organisational constraints. It refers to a period in which the organisation strategically operates at the lowest possible capacity while remaining an active organisation. It occurs when the organisation lacks sufficient resources to operate at full force, namely organisational capacity (i.e. human resources such as members and volunteers—see Chapter 5) and/or revenue. It can also occur when the organisation undergoes structural transformation; in this case, the organisation perceives this process of transformation as better positioning it to withstand the conditions of an evolving policy domain. I find that organisational hibernation is often found amongst small, typically volunteer-run, organisations—in this case, small EDI and community development LGBT NGOs. The features of small organisational size, few resources, and small beneficiary and supporter base enable volunteer-run NGOs to scale up and scale down to adapt to the shifting organisational and structural conditions of long-term policy progress.

Organisational hibernation is different from being on hiatus, which signals a pause in all organisational activity. It is reminiscent of the concept of permanent failure, which characterises persistent low performance of the organisation, a function of people's motivation to sustain the organisation (Meyer & Zucker, 1989). But whereas permanent failure characterises the normal persistent state of the organisation, one which an organisation falls into (Meyer & Zucker, 1989), I posit that organisational hibernation can be temporal and a strategic adaptation utilised for short-term or long-term purposes amongst smaller groups.

Organisational hibernation is also similar to Taylor's (1989) concept of abeyance, "a holding process by which movements sustain themselves in non-receptive political environments and provide continuity from one stage of mobilization to another" (p. 761). When a social movement is in abeyance, activists withdraw from active engagement on policy matters and instead focus on preserving movement values and identity by organising more internally oriented activities (Sawyers & Meyer, 1999; Lee et al., 2020). I note that an unreceptive political environment is the primary condition under which abeyance occurs, and activists 'wait it out' until the political environment becomes more favourable to the movement's agenda.

By contrast, my concept of organisational hibernation focuses on periods of resource scarcity and organisational transformation. It highlights an unfavourable resource context (human and economic resources) to function at full capacity and/or the undertaking of structural transformation to better position the organisation for survival in an evolving policy domain. Unlike abeyance, the receptiveness of the political environment is not the primary factor in the decision to hibernate, though it may be at play. By focusing on the resource and organisational contexts rather than mainly the political opportunity structure, this opens up the concept of hibernation to a wider range of organisations beyond social movement organisations engaged in political contention. This novel concept is a contribution to the scholarly analysis of organisational continuity (Lee et al., 2020; Jacobsson & Sorbom, 2015; Valiente, 2015; Sawyers & Meyer, 1999; Taylor, 1989; Meyer & Zucker, 1989). I discuss organisational hibernation as an adaptation to the regular operational levels of the organisation in Chapter 6.

Conceptualising the Multidimensionality of NGO Missions

NGOs pursue socially oriented missions which may be defined, re-defined, and impacted by actors and institutions internal and external to the organisation (Minkoff & Powell, 2006; Jones, 2007; Grimes et al., 2019). But NGO missions are often articulated in abstract and vague language (Helmig et al., 2014). This makes it difficult to grasp what it means for an organisational, structural, or policy force to impact the NGO mission other than that there is some substantive impact on what the organisation does—an impact often conflated with mission drift (Grimes et al., 2019; Jones, 2007). But as I demonstrate in this thesis, the organisational, structural, and policy impacts on the NGO mission are more numerous than wholesale shifts in the focus of the mission such as mission drift. Understanding the range of possible impacts on the NGO mission requires a multidimensional concept.

Indicative of this, Minkoff and Powell (2006) allude to multiple dimensions of the NGO mission, differentiating between mission and mandate. Thus, drawing from my data, I present a conceptual framework which parses the multiple dimensions of NGO missions. I draw upon this framework to outline how progressive policy shift affects the NGO mission—and how NGOs may adapt dimensions of their mission to survive the pressures of progressive policy shift and structural forces.

Across cases, LGBT NGOs pursue *missions*, which can be defined as their ultimate goals. In this thesis, how these organisations actualise their missions can be divided into their *mandate*, *outputs*, and *scale*. I define the organisational *mandate* as the types of issues and identity groups that the NGO addresses under the umbrella of their broad mission. The *outputs* of the mission define the types of activities the organisation engages in to meet its mandate. Finally, the *scale* of the mission delineates the jurisdictional scale of the NGO mission (whether the NGO pursues it at the local, provincial, national, or international level), and/or the overall size of its operations. I summarise these components of the mission below in Table 2.1.

Table 2.1: Components of the NGO Mission

Mission *The NGO's ultimate social goal(s); usually articulated as a broad vision*		
Mandate *The issues and identity groups that the NGO seeks to address in its mission*	**Outputs** *How the NGO goes about meeting its mandate: the types of activities the organisation engages in*	**Scale** *The jurisdictional scale of the mission: local, provincial, national, or international. Or the size of the NGO's operations.*

Analytical Framework: A Political Economy of Structural Forces, Progressive Policy Shift, Organisational Factors, and Adaptation

To answer my research question, I draw upon my theoretical framework and conceptual framework to formulate an analytical framework. This political economy analytical framework is not a theory but an approach to help guide analysis (Weingast & Wittman, 2011). As Weingast and Wittman (2011) note, there is no single definition of political economy. In its broadest sense, political economy refers to the relations between political and economic structures and processes, specifically the interplay of power, goals of power-wielders, and systems of exchange (Zald, 1970). In the study of organisations, political

economy focuses on how the organisation constitutes a political system: political processes such as internal decision-making, power relations, and factionalism amongst actors shape organisational behaviour (Aldrich & Pfeffer, 1976). These political processes intersect with the economy within the organisation, an exchange system in which organisational outputs (e.g. products, services) are exchanged for public support (e.g. legitimacy) (Zald, 1968, 1970; Palumbo, 1975). The acquisition and exchange of resources are vital to neutralising environmental uncertainties, negotiating power relations, and appeasing political factions within the organisation (Pfeffer, 1980).

My analytical use of political economy as it relates to organisations proceeds loosely from political economy in both the broadest sense and in the organisational sense (Zald, 1970; Aldrich & Pfeffer, 1976; Pfeffer & Salancik, 1978; Pfeffer, 1981). The political economy analytical framework in this thesis highlights broadly the intersection of politics (e.g. social policy, the policy domain) and resources in understanding how structural forces, organisational forces, and adaptation shape organisational persistence in the context of policy progress. As discussed earlier, my focus in this thesis with respect to resources is on funding, or financial resources. Thus, unless otherwise specified, my use of resources, resource dependence, and resource mobilisation concepts is in reference to funding. However, this is not to discount that other types of resources exist, such as power, legitimacy, human resources, and human capital (i.e., knowledge).

My analytical framework is comprised of three overarching themes which emerge from my theoretical framework and are found in the data. These overarching themes organise each of the three empirical chapters in this thesis and underpin the analysis within and across them. This political economy analytical framework outlines what happens to organisations when a policy shift advances their goals:

First, in the context of long-term policy shift, structural forces shape resource availability and resource mobilisation capacities. These include societal, state, and market forces independent of and related to progressive policy shift. Policy progress interacts with these structural forces and in some cases even guides the evolution of these forces to shape the opportunity structure for organisational survival.

Second, progressive policy shift itself creates the conditions for heightened resource dependence. Policy progress produces an evolving policy domain which affects organisational development, the organisational mission, and organisational capacity. Coupled with structural forces, resource dependence grows as a result, compounded by constraints around resource availability and resource mobilisation.

Third, organisations are not simply acted upon but can exercise their agency to adapt to the pressures of structural forces, policy progress, and organisational factors. However, adaptations are not a fix-all and can result in organisational strength, weakness, or a combination of both outcomes.

Conclusion

In this chapter, I provided a review of the bodies of scholarship that I draw upon to form my theoretical, conceptual, and analytical frameworks: organisational management, development management, resource dependence, and organisational ecology literatures. Organisational management and development management highlight the complexities of organisational and programmatic structures and processes. Focusing on the components and dynamics which make up the organisation, these literatures are best suited to understand what it means for organisations to get what they want and what might happen to the organisation when it gets what it wants. But they also contain an important gap, whereby getting what organisations want is typically interpreted in success concepts and as a normatively 'good thing.' Indicative scholarship in organisational management and development management shows that getting what organisations want cannot be reduced to normative concepts of success: it may instead be conceptualised as some larger external shift which advances an organisation's stated goals, but which may have unintended consequences for organisational persistence.

Resource dependence and organisational ecology literatures are well-positioned to examine this context of survival and negotiating it. Both bodies of organisational theory draw parallels to living organisms in nature, conceiving of the organisation as motivated by survival. Resource dependence highlights processes of resource acquisition, politics, agency, and adaptation in navigating survival pressures. Organisational ecology emphasises the external conditions in which organisational behaviour and thus sustainability is embedded, offering a more nuanced perspective of adaptation as contingent upon organisational factors such as origins and broader structural forces. But little research has focused on the role that resource dependence relationships play in organisational ecological processes of survival (Hillman et al., 2009). Moreover, what remains unexplored in organisational ecology is how external changes which advance organisational goals have the potential to affect the competitive and survival trajectories of a range of organisations. Drawing upon organisational management, development

management, resource dependence, and organisational ecology literatures, this thesis seeks to fill these gaps in the literature using a case study of LGBT NGOs in the context of same-sex marriage policy progress. I suggest that utilising these literatures will offer the potential to generate novel insights into the study of NGOs.

To fill these gaps in the literature, I presented my research question, which I will use to provide insight into my research puzzle. To guide the analysis in this thesis, I offered an overarching conceptual framework to understand how progressive policy shift affects organisations in a policy domain. This conceptual framework is drawn from my empirical findings and the concept of the policy domain (Burstein, 1991). I previewed the novel concept of organisational hibernation which I introduce in this thesis to help understand how organisations adapt to survival pressures with the goal of maintaining continuity. I also outlined a conceptual framework of the dimensions of the NGO mission. This highlights the range of possible impacts beyond mission drift that organisational, structural, and policy impacts can have on the organisational mission. Finally, I outlined the analytical framework which will underpin and organise the empirical analysis in this thesis: an approach which highlights the intersection of resources and politics in understanding how structural forces, organisational forces, and adaptation shape organisational survival in the context of policy progress.

These theoretical, conceptual, and analytical frameworks seek to shed light on the empirical and theoretical puzzles that comprise the overarching research puzzle (see Chapter 1): exploring this paradoxical dynamic of organisations producing unintended consequences when they get what they want, and explaining this. In the next chapter, I outline the research design and methodology utilised to answer my research question in this thesis. I discuss the bounds of applicability and generalisability of my thesis findings. I also present the case study of interest: Canadian LGBT NGOs in the context of long-term same-sex marriage legalisation.

3. Research Design and Methodology

In the previous chapters, I introduced the research puzzle that is the focus of this thesis: what happens when organisations get what they want? I disaggregated the research puzzle into its empirical and theoretical components: what are the types of problems that can arise when organisations get what they want, and how might we go about explaining this (i.e. what makes it possible)? I reviewed the literatures best suited to understanding this puzzle, one which is especially important to understand with respect to third sector organisations as they increasingly play an important role in governance in the neoliberal era. Understanding how external events which advance organisational goals affect survival gives us a more comprehensive picture of the sustainability of third sector roles in social policy and what affects this. To examine this puzzle, I formulated a research question from my review of the literature ('How does progressive policy shift affect organisational survival?') and presented the conceptual and analytical frameworks that I will use in my analysis. However, some immediate challenges arise in answering my research question given that it is intentionally broad. In this chapter, I address these challenges by outlining the research design and methodology used to answer my research question.

First, I construct a comparative case study research design of *diverse crucial* cases with two interrelated units of analysis. On one level, I am interested in studying LGBT NGOs long after same-sex marriage legalisation as a crucial case (confirmatory and pathway crucial case) of organisations affected by progressive policy change—a policy change which advances one or more of their goals (see Chapter 2). I provide a rationale for the LGBT NGO case as being particularly well-suited to answering my research question. Nested within the LGBT NGO crucial case is a comparative study of diverse city cases: three major Canadian cities (Calgary, Montreal, and Toronto) which provide unique environments on multiple dimensions in which to examine the impact of progressive policy change on LGBT organisations. After providing an overview of each city case, I then offer some empirical context for the comparative diverse crucial case study of LGBT NGOs in Calgary, Montreal, and Toronto. This sub-section draws from preliminary interview data, organisational website data, and publicly available organisational financial information. It illustrates some indicative themes of interest, setting the scene for the subsequent empirical chapters.

Second, I discuss my methodology. I provide a definition for LGBT NGOs, which informs my data collection and analysis. I discuss the sample and issues of selection bias

before delving into how I collected my data via semi-structured in-depth interviews and the issues I encountered. I discuss my method of data analysis (thematic analysis) as well as the anonymisation of my data and ethical issues in data collection and reporting of findings.

Finally, I provide a review of the generalisability of my findings and the limitations of this. I then outline the possible types of cases to which my findings may be generalisable. To do so, I outline illustrative empirical examples to demonstrate the range of possible contexts in which my thesis findings may offer useful insights to similar phenomena elsewhere.

Research Design: A Comparative Case Study of Diverse Crucial Cases

In this section, I construct my comparative case study research design of *diverse crucial cases*. I first discuss the organisational case level (unit of analysis) of LGBT NGOs as a *crucial* case and unpack what this means. I then discuss the city case level (unit of analysis) of *diverse* comparative case studies of LGBT NGOs in Calgary, Montreal, and Toronto. I then offer some organisational empirical context for my research design and descriptive context for the subsequent empirical chapters: I present indicative regional differences in what LGBT NGOs do and their organisational characteristics in Calgary, Montreal, and Toronto. These regional differences and patterns offer a glimpse of the themes of interest which pertain to my research question and arise from these cases.

The Organisational Case Level: LGBT NGOs as a 'Crucial Case'

My research question of how progressive policy shift affects organisational survival is quite broad, with an interest in the phenomenon of survival as it affects a range of organisations. As not all organisations can be observed to answer this question, my approach to answering it is through a case study method. Gerring (2001) defines a case study as an intense study of a single spatially-bounded and temporally-bounded unit with the intent to generalise across a larger set of units. Case studies are best suited to answering research questions where the aim is to elucidate insights about a larger class of phenomenon (Gerring, 2001).

To generate insights which would illuminate more of the phenomenon and which may extend to a wide range of possible organisations, I sought a case study where the potential impact of progressive policy change is likely to observably impact organisational

survival: LGBT NGOs after same-sex marriage legalisation. Because of the social significance of marriage as in institution in many societies (Cherlin, 2004), same-sex marriage legalisation holds unique symbolic weight as an LGBT right. Such is the symbolism of same-sex marriage that scholars have ruminated over 'what next' for the LGBT movement (Bernstein, 2015) and many in the LGBT community have proclaimed same-sex marriage as the end of the road for LGBT equality (see NPR, 2015 and Allen, 2015). Same-sex marriage is therefore often seen as the 'pinnacle right' or the final frontier in LGBT equality and inclusion in society (Hildebrandt, 2018). As noted in Chapter 1, examples such as the American Foundation for Equal Rights show that same-sex marriage legalisation may have an adverse impact on the livelihoods of LGBT NGOs which advocated for it. This organisational impact is seen elsewhere in the United States and in Europe where same-sex marriage or same-sex domestic partner benefits have been legalised (Riley, 2015; Washington Blade, 2015; Hildebrandt, 2018). Thus, I conceive of same-sex marriage legalisation as a major progressive policy shift for LGBT NGOs, one which advances one or more of their goals and which might affect their livelihoods.

The case of LGBT NGOs after same-sex marriage legalisation is therefore a 'crucial case,' or one which is integral to explaining the phenomenon of interest (Gerring, 2007b; Eckstein, 1975). Specifically, this crucial case method combines elements of Gerring's (2007b) 'confirmatory (least likely) crucial case' and 'pathway case.' The confirmatory crucial case is used to confirm a theory using a unit or units of analysis which are the *least likely* to provide support for it; if the units of analysis demonstrate the hypothesis—in this case, that progressive policy shift does affect organisational survival, a hypothesis derived from my review of the literature and empirical examples (see Chapter 2)—then it provides the strongest support for the theory (Gerring, 2007b; Levy, 2002). Having established that the hypothesis is true, the pathway crucial case serves to illuminate the causal mechanisms (Gerring, 2007b)—just *how* does progressive policy change impact organisational sustainability?

To illustrate, LGBT NGOs play multiple roles in the third sector and across multiple areas of issue focus, as I detail below. LGBT NGOs include advocacy organisations, service providers, and associational groups. The impact of same-sex marriage on LGBT advocacy groups has been observed. But whether and how service providers, and to a lesser extent associational groups, are affected is not known. Because these groups are not primarily involved in LGBT rights advocacy, we might not expect them to be affected by the legalisation of same-sex marriage. Compared to advocacy

organisations, they are least likely to be affected. If they are impacted, however, studying these organisations would provide valuable insights into understanding more of the phenomenon of how progressive policy shift affects organisational sustainability—specifically, in line with the 'pathway crucial case,' the routes by which policy change can impact organisational livelihoods. In line with the 'confirmatory crucial case,' it would also provide strong support for the contention in this thesis that progressive policy shift can shape organisational survival.

Within this crucial case study, spatially- and temporally-bounded cases of smaller size may be situated as points to understand the larger case study phenomenon. As I cannot observe all possible LGBT NGOs, I narrowed my focus to a region and locale where LGBT NGOs are likely to have experienced a variety of effects of same-sex marriage legalisation: major cities in Canada. Thus, my crucial case study research design contains two main interrelated units of analysis, or levels of cases: the organisational unit/case of LGBT NGOs and the city unit/case of Canadian cities.

The City Case Level: LGBT NGOs in Calgary, Montreal, and Toronto as 'Diverse' Cases

In 2005, Canada became the fourth country in the world to legalise same-sex marriage through the passage of the *Civil Marriage Act*. The Canadian context therefore offers a long period during which same-sex marriage could have affected LGBT NGOs. Massive geography and regional variation coupled with the Canadian federal system further offer multiple regional cases in which this policy shift may differently affect LGBT NGOs. Further, cities offer an environment with denser LGBT populations served by a multiple LGBT NGOs working in different areas of focus. Complex policy challenges of diverse urban spaces (Hubbard, 2018) present the likelihood that regional social, political, and economic factors will be at play in major cities and may affect the behaviour and sustainability of LGBT NGOs.

For feasibility, I focus on three city cases: Calgary, Montreal, and Toronto. The largest cities in their respective province, these cities are 'diverse cases' (Gerring, 2007a). That is, they contain a range of social, political, and economic dimensions which produce distinct environments in which to examine how progressive policy change affects organisational survival.

But while I denote these as city cases, my focus on their social, political, and economic ecology is not purely based at the local level. Indeed, what makes the city environment unique is its embeddedness in the provincial and regional environment, and

how provincial/regional forces interact with those at the federal level. Given the extensive powers afforded by the federal government to Canadian provinces and territories, as well as localised regional development across a massive geographical landmass, these subnational regions tend to vary in welfare state orientation and size, economic makeup, and sociocultural norms frequently tied to regional identity. Granted, governing ideologies, political values, and policy agendas do change with the administration in power. However, as I show in Chapter 4 with respect to societal, state, and market forces, there is an embeddedness of the city environment within wider and 'stickier' socio-historical, political, and economic developments rooted at the local level, provincial level, and in local/provincial interactions with the federal level. These 'sticky' dimensions shape the policy domain in which LGBT NGOs operate.

At 1.3 million residents, Calgary is the fourth-largest city in Canada. In the western Canadian province of Alberta, Calgary is the urban centre of what might be characterised as a libertarian-leaning 'frontier' state—the political and economic right of Canada. Alberta politics and society are shaped by its geographic isolation as a landlocked province, alienation from the geographically and politically distant federal centre (what is known as 'Western alienation' – Gibbins, 1979; Lawson, 2005), and a rich oil- and petroleum-based economy—Calgary itself is the corporate headquarters of the province's oil and petroleum industry. These political and economic factors are intertwined with a pervasive regional culture characteristic of the mountains and plains regions: a sense of rugged individualism, suspicion of political authority, preference for small government, and an affinity to populist right wing politics which stems from early American settlement in the province (Ashley & Alm, 2015; Wiseman, 2011; Sayers & Stewart, 2013; Banack, 2013). These factors are reflected in Alberta's lean welfare state, which Harles and Davies (2005) compare with that of the United States.

Reflecting attitudes elsewhere in the province, Calgary has a history of hostility towards LGBT people. In the 1980s and 1990s, gay men were frequent targets of anti-LGBT violence in the city (Calgary Gay History Project, 2016). At the provincial level, conservative government administrations have historically pursued policies demonising LGBT issues and people to appeal to their right-wing base of support (Rayside, 2008). While other provinces had legalised same-sex marriage prior to the federal legalisation in 2005, Alberta was one of the last holdouts. In fact, the provincial government passed a short-lived ban on same-sex marriage in anticipation of its 2005 national legalisation (CBC News, 2012). By contrast, both Quebec and Ontario provincially legalised same-sex

marriage ahead of its federal legalisation, revealing markedly different sociocultural and political environments for LGBT people.

At the other end of the spectrum is Montreal, the urban centre of Quebec, the heart of French Canada. With approximately 1.8 million residents, Montreal is the second-largest city in Canada. Its bilingualism and diverse population lay bare the conflict between Anglophone and Francophone culture and politics, as well as French Catholic roots and contemporary secular values. Quebec politics and society are shaped by its historical, linguistic, sociocultural, and geopolitical ties to France and the broader French-speaking world (Béland & Lecours, 2005; Keating, 1999; Feldman & Gardner Feldman, 1984). This is exemplified in the province's decades-long project of building and cultivating a French-speaking Quebec nation (Béland & Lecours, 2005). This initiative saw the construction of a massive state apparatus, the rise of separatist politics seeking to de-federate from Canada, and the desire to be recognised as a distinct society from the rest of Canada (Zubrzycki, 2016; Vaillancourt & Thériault, 2008; Rocher, 2002; Banting, 1988). Representative of the political and economic left in Canada, Quebec's extensive welfare state—comparable to those in Scandinavian countries (Harles & Davies, 2005)—is central to its claims of being a largely functionally autonomous province (Keating, 1999; Courchene, 1990). Within this arrangement, NGOs function as arms of the state apparatus (Laforest, 2009). Such nation-building politics epitomises anti-federal sentiment (or at the very least, federal disenchantment) in Quebec politics. While nation-building was the impetus for major regional economic development in the province, past sovereigntist politics has also been responsible for corporate flight from province, specifically Montreal (Keating, 1999; Courchene, 1990).

In the political and economic centre is Toronto. Toronto can be characterised as a cosmopolitan city with global flows of money, culture, and people. It is home to approximately 2.8 million people, with almost 6 million people in the greater Toronto metropolitan area. This makes Toronto the largest city in Canada, with almost one-sixth of the total Canadian population residing in the greater Toronto area. Toronto is the national corporate centre, where most Canadian headquarters of major national and multinational corporations are located. Both Montreal and Toronto are LGBT metropolises: cities with large LGBT populations, prominent gay villages, and a tradition of vibrant LGBT cultures. An historically and culturally important site for Canadian LGBT politics and activism (McCaskell, 2016; Warner, 2002), LGBT politics is most pronounced in Toronto. Additionally, according to the 2016 Census, Toronto has the second-highest percentage of

foreign-born residents in the world, originating from 230 different nationalities and accounting for nearly half of Toronto's population (World Population Review, 2020a; Flack, 2016; Statistics Canada, 2016b). Almost half the population belongs to a visible minority group, leading BBC Radio to declare Toronto the most diverse city in the world in 2016 (Flack, 2016). The city's diversity is a defining feature, one which affects the complexity of LGBT identity politics (which I define in Chapter 4) in addition to social policy issues such as income inequality (Hulchanski, 2007).

Amplified by complex policy challenges of the urban megaspace (Hulchanski, 2007), regional social, political, and economic factors are therefore likeliest to be at play in Calgary, Montreal, and Toronto and to observably affect NGO livelihoods. These city cases thus comprise an amalgam of social, political, and economic forces arising from the local city level, which are themselves informed by local interactions with provincial and regional forces, as well as provincial and regional interactions with the federal level. With these cities containing sizeable LGBT NGO sectors and LGBT populations, these factors are also likeliest to produce "geohistorically-specific sexual identit[ies]" shaping LGBT NGO behaviour (Kanai, 2014, p.3; Hubbard, 2018). This comparative case study design allows me to examine the range of possible ways that policy shift might shape the context for LGBT NGOs, with knock-on effects for LGBT communities, and vice versa. As I later discuss, this enables me to widen the applicability of my findings to similar NGOs in comparable cities globally. These cases are *not* representative of what is happening across Canada but indicative of what could be happening elsewhere to differing degrees.

As a research design note, I add that to some extent, I arrived at this city-level case study design after some post-data collection reflection. Such is the richness of social, political, and economic variation across Canadian provinces and territories that my initial research design was a comparative case study of three provinces: Alberta, Quebec, and Ontario. Similar to the current research design, I focused on Calgary, Montreal, and Toronto for feasibility. But I had initially envisioned these city cases as data points which would illuminate provincial-level patterns—opportunities to speak about how same-sex marriage impacted LGBT NGOs in Alberta, Quebec, Ontario, and Canada more widely.

However, when presenting my preliminary findings to NGO leaders at an LGBT sector development conference in Toronto, I realised the shortcomings of this approach. After my talk, I was approached by the leader of an LGBT NGO in Regina, Saskatchewan who pointed out that the opportunities and challenges experienced by organisations in large cities may be very different from those in smaller cities and towns across Canada. This

would therefore limit my ability to speak about what was happening 'in Canada.' The experiences shared by small town LGBT NGO leaders attested to this: the single LGBT NGO which was responsible for all facets of LGBT advocacy, service provision, culture, and associational life was not a feature of major Canadian cities, but prevalent in small cities and towns—in these small locales, there was no 'sector' of LGBT NGOs to speak of. As such, having collected data in three major cosmopolitan cities, I reflected on the extent to which I could speak about provincial cases. Consequently, I revised my research design, narrowing the regional case to the city level.

Level of Analysis in this Thesis

In my investigation of how policy shift affects organisational survival, I utilise a meso level of analysis in this thesis. In this meso level of analysis, my primary focus is on the organisation level and the level of the organisational population (e.g. of issue area-based groups of LGBT NGOs, LGBT NGOs in each city, and of LGBT NGOs as a whole across cases). My analytical interest is the population of LGBT organisations which comprise a policy domain, how they negotiate survival within a policy domain, and how structural and policy forces affect the policy domain to impact upon the dynamics of survival. As such, and as I discuss later in this chapter in the methods section, I interviewed a large number of organisations with the initial intent of interviewing the population of LGBT NGOs (I later discuss why interviewing the entire population of organisations was not feasible).

Of course, this is not the only level of analysis that could be used to study my research question. An equally interesting option would be a micro level of analysis focusing on the dynamics of the population within the organisation and how internal decision-making, individual interests, politics, individual agency, and conflict from the top to the bottom of the organisation affect the organisational strategy for negotiating survival. In this option, I would have interviewed a small number of organisations in-depth to gain a deeper, richer understanding of how progressive policy change affects survival and more broadly how external shifts affect organisational persistence.

However, my rationale for using a meso level of analysis is that I sought to uncover insights about organisational survival which could be generalisable beyond the LGBT NGO and Canadian case. Producing more generalisable insights was an important research imperative in this project. As I discuss later in this chapter, there are unique elements to the LGBT NGO and Canadian case which may make the findings less generalisable. To help mitigate this (as far as possible) and to generate analytical insights that could be more widely-utilised, I intentionally used a meso level of analysis. As such, rather than focus in-

depth on a small number of organisations, I analysed a greater number of organisations at the organisation level with the intent of being able to speak to wider patterns throughout the population within the policy domain. A weakness of this approach is that this analytical focus could not capture the rich micro-level detail that would be useful to illuminate my puzzle of survival. However, a prime advantage is that this meso level of analysis enabled me to infer *patterns* of organisational-level behaviour in how organisations respond to external pressures as a means to survive within the policy domain. Being able to determine whether what I was observing in the field was unique to the organisation or common within the population made more possible my research goal of producing more generalisable insights.

Moreover, as I discovered later in the field, practicality and ethical challenges made a micro level of analysis across all cases less feasible as a research design option. While securing and conducting interviews in Montreal, I was told by my participants that LGBT NGOs were over-researched in that city. Participants were regularly inundated with requests from postsecondary students and researchers seeking to interview them for research projects. With capacities already overstretched across LGBT NGOs in Montreal, asking organisations to additionally participate in my research became an ethical issue. As I later mention, one participant informed me that even taking an hour out of their schedule to participate in an interview would have meant taking an hour away from providing services to vulnerable clients. In fact, to even secure my interview with this participant, I was asked to provide a detailed rationale of how my research would benefit the community and whether I would be in a position to help the organisation with their research activities in exchange for the interview (to address this, I noted that my research would be made publicly available for use by NGOs, researchers, and policymakers to inform decision making and that it would benefit participants and the community in this way—I did not agree to doing research for the participant in exchange for the interview).

Thus, to minimise my intrusion on LGBT NGOs in Montreal and to minimise my impact on their capacity and their work, I was cognizant of keeping my interviews to the set amount of time and to interviewing only leaders. Retrospectively, this would have presented a significant barrier to a micro level of analysis of LGBT organisations in Montreal. It lent support for my meso level of analysis as appropriate to fit this case, balancing feasibility with ethical research practice.

The Analytical Level of Agency in this Thesis

Pursuing a meso level of analysis also impacts my operationalisation and discussion of agency in this thesis. As I noted in Chapter 2, agency is a key assumption in how I conceptualise and operationalise adaptation and survival in this thesis, drawing from my use of resource dependence literature. Organisational agency refers to the capacity of the organisational unit to exercise actions with the intent of producing a certain outcome in relation to the environment in which they operate. Organisational agency is distinct from the individual agency of actors within the organisation, but they are intertwined. Individuals within the organisation have the capacity to shape organisational agency, impacting strategy, adaptation, and survival processes. The role of individual agency in affecting organisational agency is further shaped by power, politics, and competing interests within the organisation.

Both organisational agency and individual agency are interesting to explore in understanding organisational survival within a policy domain. However, because my level of analysis is located at the meso level—focusing on the level of the organisation and the organisational population in relation to the environment in which they operate in—my focus on agency in this thesis is located primarily at the level of the organisational unit (i.e., organisational agency). This is not to say that individual agency is not analytically interesting or important. In fact, understanding the agency and behaviour of the population within the organisation is equally analytically interesting to understand organisational survival and shifts in strategy.

But as noted above (and as I later discuss with respect to methods), my organisational level of analysis informed my research design and methodology. As I am interested in the organisational strategy underpinning resource mobilisation, adaptation, and survival within LGBT NGOs and the population of LGBT NGOs, I interviewed one participant per organisation: the NGO's leader. My rationale for this is that NGO leaders would be the most knowledgeable about these organisational-level, population-level, and policy domain-level themes I am interested in. My rationale was confirmed by the richness of the data I collected in the field and their relevance to answering my research question. This method was also the most feasible given the number of organisations I sought to interview in a limited timeframe of data collection. As a result, though, with respect to agency, my data pertaining to organisational strategy, resource mobilisation, adaptation, and survival captured mostly agency at the level of the organisational unit. Where I was able to directly capture individual agency, it was primarily that of the NGO's leader because this is who I interviewed. With my methodology, I could not directly capture the

agency of individual actors throughout the organisation in order to understand their role in organisational adaptation and survival.

As such, my ability to speak about and discuss in detail the agency of individuals within the organisation is limited. Where I directly discuss individual agency in this thesis, it is primarily in relation to the NGO's leader. Otherwise, the agency of individuals within the organisation and their role in influencing processes of resource mobilisation, adaptation, and survival is presumed in my references to organisational agency. Moreover, as noted in Chapter 2, where I discuss resource mobilisation, adaptation, and survival, I am invoking organisational agency as it is my assumption in this thesis—which is supported by my data—that the organisational capacity to engage in these processes requires exercising agency.

LGBT NGOs in Calgary, Montreal, and Toronto after Same-Sex Marriage: Case Study Empirical Context

In this section, I present an overview of LGBT NGOs in Toronto, Montreal, and Calgary in the post-marriage context. This overview serves as a starting point for understanding the case under study, providing descriptive context for the empirical analysis in this thesis. I focus on NGO issue area and patterns in organisational type, size, and wealth. This capture is based on preliminary interview data collected for this thesis, supplemented by news reports and a scan of LGBT organisation websites in each city, which I used to inform my research design. Discussion of organisational size and wealth are based on available annual financial reports from organisation websites and publicly available information from the Canada Revenue Agency website (based on filed T3010 registered charity information forms—all registered charities in Canada are required to file annual T3010 forms in which they describe their programs, report financial information such as revenue and expenditures, and confirm whether the organisation is active or has dissolved). I later combined the data from these sources with self-reported financial information from my interviews, which filled in gaps for organisations with no publicly available financial data. The overview presented below is summarised in Tables 3.1, 3.2, and 3.3 at the end of this section.

Across cases, I found that LGBT NGO missions can be categorised into five broad issue areas: 1) equality, diversity, and inclusion (EDI); 2) community development; 3) arts and culture; 4) immigration and refugee issues (IRI); and 5) health. These issue areas are not mutually exclusive. Many LGBT NGOs have missions traversing more than one issue

area. Moreover, NGOs may play multiple roles, acting as issue advocates, service providers, funders, partners to other organisations, and/or providing spaces for associational activity (Lewis, 2014).

Equality, diversity, and inclusion (EDI): After same-sex marriage legalisation, equality, diversity, and inclusion characterises a broader shift from legal equality to lived equality. In addition to legal rights and protections, lived equality encompasses equal access to the components necessary for human wellbeing, such as employment, healthcare, housing, and living without fear of prejudice. NGOs in this area seek to promote the equality of LGBT people 'out there' in society through advocacy, policy consultation, diversity and inclusivity training, and producing informational resources.

As a methodological note, EDI in this thesis refers to 'equality, diversity, and inclusion' rather than the commonly used 'equity, diversity, and inclusion' or 'equity, diversity, inclusion, and decolonisation' because 'equality' is the term that most encapsulates this issue area across cases at the time of data collection. The use of 'equality' rather than 'equity' draws directly from my interview data. While some LGBT NGOs interviewed use the term 'equity' to describe their EDI activities and the conceptual approach they take when undertaking these activities, this was not the case for all. Organisations that described adopting an intersectional approach in their mission and activities tended to use the term 'equity.' Many of these organisations also mentioned decolonisation in their activities. That is, decolonisation either in the context of upending dominant institutional structures (e.g. policy, systems of governance, knowledge, family and social structures) to foreground Indigenous peoples and other ethnoracial groups in Canada, or upending heterosexual-, cisgender-, and reproductive-focused institutional structures to foreground sexual and gender diversity, or both.

However, those that did not adopt intersectionality tended to use 'equality' and did not refer to decolonisation concepts. This was most common among Montreal participants, where respondents themselves used the language of moving from legal equality to lived equality, which also mirrored the language of the Quebec government with respect to LGBT issues. But it was not isolated to Montreal participants. The language of moving from legal equality to lived equality was also evident among political advocacy organisations even in Toronto. Among advocacy groups, this may reflect certain political leanings within the organisation (e.g. ideological disagreements with ideas of equity) and/or potentially strategic framing to get greater 'buy in' for their agendas across the political spectrum (e.g. where equity may be ideologically or politically contentious for

those on the political right). As such, 'equality, diversity, and inclusion' is used in this thesis as a catch-all umbrella term to describe this issue area. However, it should be noted that within this umbrella, some organisations use an equity (and decolonisation) lens in their work and others use the lens of equality.

Similarly, I use 'LGBT' in this thesis as a catch-all term, because it is most inclusive of how organisations self-identified at the time of data collection. Like with 'equity,' not all organisations interviewed used terminological variants common in Canada such as LGBTQ (lesbian, gay bisexual, transgender, queer), LGBTQIA+ (lesbian, gay bisexual, transgender, queer, intersex, ally…), or LGBTQIA2S+ (lesbian, gay bisexual, transgender, queer, intersex, ally, 2-spirited[2]…). For organisations using 'LGBT,' reasons for this included: not subscribing to an intersectional approach (but this was not always the case); not wanting to advertise certain letters if these groups were not represented in the service offerings (I elaborate upon this in Chapter 5); maintaining the organisation's name (where it has long featured 'LGBT' dating back to when this was the most commonly used term—I discuss name changes to accommodate the expanding acronym in Chapter 6); and using 'LGBT' as a catch-all where the organisation decided to shorten the expanding acronym to four letters for greater simplicity, but with the understanding that it is an umbrella term of a range of sexual and gender identities.

Thus, my use of 'LGBT' is deliberate. As an umbrella term, it is most encompassing of the terms that participants used to identify their organisation and what they do. As a shorter acronym, it avoids suggesting that certain identity groups and issues are involved, addressed, or at play when they may not be. For instance, to use 'LGBTQ' might be interpreted to imply that all organisations interviewed recognized or addressed queer issues and identities in their mission and activities, which was not the case. This was common amongst some Francophone organisations in Montreal where the gendered nature of the French language makes it difficult for queer identities to be accepted, even by some LGBT activists and organisations (I discuss this further in Chapter 6). As such, some leaders self-identified their organisations as being strictly focused on the L, G, B, and maybe the T. Similarly, to use 'LGBTQIA+' might suggest that the interviewed organisations all work on intersex issues or serve the intersex community specifically, which was also not the case. In fact, very few NGOs reported working on intersex issues.

[2] 2-spirited refers to two-spirited sexual and gender identities, the Indigenous term in Canada for sexual and gender identities with both masculine and feminine spirits.

One Montreal NGO leader explained that the lack of focus on intersex issues is due to the very delicate and complex nature of the issue, which most organisations may not have the expertise yet to address ethically. Similarly, using 'LGBTQIA2S+' might suggest that the organisations interviewed necessarily work on two-spirited issues or have programs or services geared specifically to two-spirited groups. Again, this was not the case. As I discuss in Chapter 5, this is not out of prejudice but out of limited capacity and an organisational desire not to overpromise what they can offer.

As such, for the most all-encompassing representation, I have used 'LGBT' as a catch-all umbrella term to refer to the organisations I have interviewed, the communities they serve, and the issues they address with the understanding that some of these groups self-identify as 'LGBTQ' or 'LGBTQIA+' or 'LGBTQIA2S+', others self-identify as 'queer,' others self-identify as 'LGBT,' and still others self-identify as another variation of these terms. My use of 'LGBT' is moreover a variation of the term that the United Nations uses, which is LGBTI. For representational reasons, I have omitted the 'I' for reasons mentioned above.

Community development: In contrast to EDI, community development NGOs work 'inside' the LGBT community with the aim of cultivating the capacity and wellbeing of LGBT people. Key to this is building community, the provision of community space, and addressing inequalities within the LGBT community. Organisations most associated with this issue area are community centres, social service providers, recreational and associational groups, community funders (e.g. LGBT foundations), and organisations engaged in sector development.

Arts and culture: Arts and culture NGOs produce or help cultivate LGBT art and culture. This includes large professionalised NGOs organising some of the largest LGBT festivals in Canada, such as parades, film and theatre festivals, and drag shows. Across cases, LGBT NGOs use arts and culture as vehicles for community development and EDI.

Immigration and refugee settlement (IRI): Immigration and refugee settlement includes service providers which help new LGBT immigrants and refugees settle into newcomer life. It also includes 'crisis response' NGOs which relocate LGBT refugees facing immediate persecution.

Health: NGOs with a health-based issue area address LGBT mental health, sexual health, and HIV. These groups are typically service providers with activities and services geared toward prevention and treatment, outreach, supports and referrals, and professional and peer-based counselling. Progressive structural change in the form of same-sex

marriage legalisation and the decline of the HIV/AIDS epidemic affects the trajectories of these NGOs.

Almost all interviewed organisations except for those in health have LGBT-specific missions, focusing exclusively on LGBT issues (see Table 3.3 at the end of this section). In Toronto, Calgary, and Montreal, I found that LGBT NGOs most commonly work in the areas of EDI, community development, and health. A smaller number of LGBT NGOs focus on arts and culture, and IRI. Notably, Calgary has the smallest number of LGBT organisations of the three cases, a reflection of its smaller population, which is about half the size of Toronto's population and about three-quarters the size of Montreal's population. As such, LGBT organisations in Calgary are likelier to fulfil multiple issue areas. Reflective of large LGBT populations and structural forces, Toronto and Montreal both have large numbers of LGBT organisations. But I note that while both cities have a similar number of LGBT NGOs, Montreal has a population less than two-thirds of Toronto's. In addition to a disproportionately large number of organisations, more organisations in Montreal fulfil single issue areas and more groups are organised around specific sexual, gender, and ethnoracial identity groups.

Moreover, I found that organisations across the five categories of mission focus vary in type, size, and wealth. While not a complete capture of all LGBT NGOs in each city, the makeup of organisational type and characteristics point to distinct patterns in each city. These patterns point to regional differences in structural forces and opportunity structures for organisational continuity, which I explore over the course of the next several chapters.

Notably, LGBT NGOs in Toronto and Calgary are mostly registered charities (see Table 3.1), with 60% or more interviewed organisations in each city having charitable status and the rest comprised of registered nonprofit organisations and non-registered NGOs (e.g. grassroots organisations). Unlike Toronto and Calgary, Montreal organisations were likelier to be registered nonprofit organisations rather than charities or non-registered NGOs. Only 20% of interviewed Montreal groups had charitable status, with about 75% of groups having registered nonprofit status.

Indeed, variation in organisational type correlates with size and wealth (see Tables 3.1 and 3.2 at the end of this section). Organisation size in this thesis is determined by wealth, which refers to the reported annual revenue relative to all other LGBT organisations in this study. LGBT organisations in Toronto and Calgary tend to be larger and richer, with about 40% of interviewed groups operating on budgets of at least $1

million. In Toronto, almost 14% of interviewed NGOs had budgets of at least $5 million, a very large sum in the Canadian context (see Smith, 2008). The wealth of Toronto's LGBT NGOs is also related to NGO issue area: it uniquely reflects a disproportionately large number of health and specifically HIV-focused NGOs which receive significant public health funding, a vestige of the public health response to the city's 1980s-1990s AIDS crisis. In Toronto and Calgary, there are many large and many small organisations (budgets of $99,999 or less), but Toronto has a larger number of medium-sized groups with budgets of between $100,000 and $999,999. Calgary's sector is instead a more binary tale of rich and poor organisations. This contrasts sharply with Montreal, which boasts a very large, 'flat' sector of organisations of roughly similar size and wealth: most interviewed organisations were medium-sized. Just one interviewed organisation in Montreal had a budget in excess of $1 million.

On the whole, cross-case patterns and differences in the type, size, wealth, and number of LGBT NGOs in each city provides an indication of the role of structural forces and organisational factors in the context of long-term policy progress. As I show in the subsequent chapters, these forces shape resource availability, resource mobilisation, and resource dependencies, ultimately affecting the conditions for survival. But as I illustrate, they are also the impetus for adaptive behaviour made in a bid to survive the conditions of a changing policy domain.

In sum, my comparative case study research design of diverse crucial cases (of LGBT NGOs in Calgary, Montreal, and Toronto) is well-suited to examining my research question. In the post-marriage context, LGBT NGOs are a crucial case of the impact of progressive policy change on organisational survival. The multiple roles and issue areas in which LGBT NGOs are active provide the opportunity to observe the various pathways via which policy shift can affect sustainability. This is further facilitated by the embeddedness of these organisations in diverse city environments, where regional forces shape organisational characteristics, behaviour, and livelihoods. Thus, examining the diverse crucial cases of LGBT NGOs in Calgary, Montreal, and Toronto may offer the strongest support for my contention in this doctoral thesis that progressive policy shift can shape organisational livelihoods.

Table 3.1: Distribution of LGBT NGOs Across Cases by Organisation Type

The following table outlines the distribution of active LGBT NGOs by organisational type within each case. The 'other' category refers to NGOs which are neither registered charities, registered nonprofit organisations, nor fit the profile of non-registered nonprofit organisations. This can include NGOs registered as businesses.

	Number and Proportion of Organisations by Type within Cases			
Organisation Type		*Calgary*	*Montreal*	*Toronto*
	Registered Charity	6 (60%)	4 (20%)	14 (63.6%)
	Registered Nonprofit Organisation	3 (30%)	15 (75%)	4 (18.2%)
	Non-Registered Nonprofit Organisation	1 (10%)	0 (0%)	3 (13.6%)
	Other	0 (0%)	1 (5%)	1 (4.5%)
	LGBT NGO Total (n=52)	10 (100%)	20 (100%)	22 (100%)

Table 3.2: Distribution of LGBT NGOs Across Cases by Organisational Size

The following table outlines the distribution of active LGBT NGOs by organisational size within each case. Organisational size is measured in terms of organisational wealth, which refers to the size of reported annual revenue relative to all other LGBT organisations in this study. Reported organisation income and expenses refers to those self-reported in interviews, in annual reports, on the NGO's website, or in publicly available T3010 registered charity information forms filed with the Canada Revenue Agency (CRA) and accessible via the CRA website.

	Number and Proportion of Organisations by Size within Cases			
Organisation size		*Calgary*	*Montreal*	*Toronto*
	Very Large (annual revenue of $5 million and above)	0 (0%)	1 (5%)	3 (13.6%)
	Large (annual revenue of $1 million to $4,999,999)	4 (40%)	0 (0%)	6 (27%)
	Medium	2 (20%)	12 (60%)	8 (36.4%)

	(annual revenue of $100,000 to $999,999)			
	Small (annual revenue of $10,000 to $99,999)	3 (30%)	4 (20%)	2 (9.1%)
	Very Small (annual revenue of $0 to $9,999)	1 (10%)	3 (15%)	3 (13.6%)
	LGBT NGO Total (n=52)	10 (100%)	20 (100%)	22 (100%)

Table 3.3: A Demographic Breakdown of LGBT NGOs Interviewed

The following table provides a breakdown of the 52 active and 2 ‘dead’ (i.e., no longer active) LGBT NGOs interviewed for this thesis. It includes data on NGO type, age (calculated or estimated from the year of founding), type of funding received, components of the NGO mission (including a detailed breakdown of organisational outputs/area of sub-operation within the mandate—see Table 2.1 in Chapter 2 for my conceptual framework of the components of the NGO mission), and approximate number of staff (paid or unpaid, not including volunteers or board members). The data is drawn from my interviews and from NGO websites where available.

Paid and unpaid staff are included together, as not all LGBT NGOs have the budgets to pay for staff. For very small organisations (see Table 3.2), for instance, the LGBT organisation is the side project of staff members who work regular day jobs elsewhere. As such, the ‘staff’ category comprises the organisational members who are part of the regular day-to-day operations of the organisation, regardless of whether or not they are paid. By contrast, volunteers are individuals who occasionally help out at the organisation (e.g., for events) and are not part of the regular day-to-day operations.

To note, the number of staff is an approximation, as staff numbers can fluctuate over time. Exemplifying this, several of the NGOs interviewed have since expanded their operations and hired additional staff. In the case of one IRI NGO, the number of staff doubled between the time the interview was conducted and when this table was put together three years later. In other instances, positions may go unfilled or may be eliminated temporarily or permanently. The approximation in the table provides an indication of the current regular capacity (i.e., circa 2021) of the organisation while taking into account these factors.

Abbreviation Key:

Org: Organisation

GBMSM: Gay, Bisexual, and Men Who Have Sex With Men

			FUNDING SOURCE			ORGANISATIONAL MISSION				
Location	**NGO Type**	**Org Age (yrs)**	**State**	**Corporate**	**Donations/ philanthropy**	**Identity Groups within Mandate**	**Issue Area(s) of Focus**	**Outputs/ Area of Sub-Operation**	**Org Scale**	**No. of Staff**
Calgary	Registered charity	33	x	x	x	LGBT	Community development	Provision of community programs, services, and community space	Local	3-5
Calgary	Registered charity	19		x	x	LGBT	Funder	Funder of LGBT community programs and projects	Local	3-5
Calgary	Registered charity	16	x	x	x	LGBT	Arts and culture, community development, EDI	Film festival, film programs, provision of community programs, provision of workplace diversity and inclusion workshops	Local	3-5
Calgary	Registered nonprofit	46			x	LGBT	Arts and culture	Drag shows; third party fundraiser to other LGBT NGOs	Local	3-5
Calgary	Registered nonprofit	~10* (NGO is no longer active)			x	Lesbian and gay	EDI	Political advocacy	Provincial	3-5
Calgary	Registered charity	49	x	x	x	Mainstream	Community development, health, EDI	Provision of community programs, sexual health services, and	Local	5-7

								community space; provision of diversity and inclusion workshops; resource development		
Calgary	Registered charity	36	x	x	x	Mainstream	Health (HIV)	Provision of HIV and sexual health services and community programs	Local	8-10
Calgary	Registered nonprofit	5	x	x	x	Trans	Community development, EDI, health	Provision of trans services (mental health, referrals) and community programs; some advocacy	Provincial	3-5
Calgary	Non-registered NGO	5			x	LGBT; ethnoracial	EDI	Political advocacy	Local	3-5
Calgary	Registered charity	54			x	Mainstream	Community development	LGBT-inclusive church; associational activities	Local	15-20
Calgary	Registered nonprofit	12	x	x	x	LGBT	Arts and culture	LGBT festival	Local	3-5
Montreal	Registered charity	22	x	x	x	LGBT	EDI	Public awareness campaigns, social advocacy; provision of diversity and inclusion workshops	Provincial	1-3
Montreal	Registered charity	27	x	x	x	LGB	EDI	Provision of diversity and inclusion workshops in schools	Local	5-7
Montreal	Registered nonprofit	18	x		x	LGBT, youth	Community development, health	Provision of sexual health community services, resources,	Provincial	1-3

								and community space		
Montreal	Registered nonprofit	17	x	x	x	LGBT, youth	EDI, community development	Sector representation	Provincial	1-3
Montreal	Registered nonprofit	23	x		x	LGBT, families	EDI, community development	Political advocacy, provision of diversity and inclusion workshops, associational activities	Provincial	3-5
Montreal	Registered nonprofit	10	x		x	LGBT, youth	Community development	Provision of community programs and community space, development of sexual and gender diversity resources	Local	1-3
Montreal	Registered nonprofit	38	x		x	Gender diversity	EDI, community development	Provision of community programs and community space, political advocacy	Provincial	1-3
Montreal	Registered nonprofit	5		x	x	LGBT	EDI	Provision of sexual and gender diversity workshops	Local	1-3
Montreal	Registered charity	35	x	x	x	LGBT	EDI, health	Provision of social and community services (LGBT helpline)	Provincial	3-5
Montreal	Registered nonprofit	14	x	x	x	LGBT	Arts and culture	LGBT festival	Local	3-5
Montreal	Registered nonprofit	17		x	x	LGBT, ethnoracial	Community development, IRI	Provision of community space, provision of	Local	1-3

								immigration and refugee settlement services, associational activities		
Montreal	Registered nonprofit	25	x		x	Queer women	EDI	Political advocacy, provision of community space	Provincial	1-3
Montreal	Registered charity	30	x	x	x	GBMSM	Health (HIV)	Provision of HIV services, sexual health services, and GBMSM health programs	Local	20-25
Montreal	Registered nonprofit	25	x	x	x	LGBT	Community development, IRI	Provision of community space, provision of immigration and refugee settlement services	Local	1-3
Montreal	Registered nonprofit	25	x		x	Queer women	Community development, IRI	Provision of community space, provision of immigration and refugee settlement services	Local	1-3
Montreal	Registered nonprofit	15			x	LGBT	EDI, community development	Provision of gender and sexual diversity workshops, provision of community space	Local	1-3
Montreal	Registered nonprofit	24	x	x	x	LGBT	EDI, community development	Professional association activities	Provincial	1-3
Montreal	Registered nonprofit	25	x	x		LGBT	EDI	Political advocacy, sector representation	Provincial	1-3

Montreal	Registered business	9	x	x	x	Queer women	Arts and culture	Production of queer women's media content (print, social media) and social events	Local	3-5
Montreal	Non-registered nonprofit	8	x	x	x	Trans, youth	EDI, community development	Political and social advocacy, provision of community resources and community space	National	1-3
Toronto	Registered charity	45	x	x	x	LGBT	Community development, EDI, IRI	Provision of community programs and community space, provision of gender and sexual diversity workshops, development of gender and sexual diversity resources, provision of immigration and refugee resettlement services	Local	25-30
Toronto	Registered charity	19	x	x	x	Mainstream	Health, community development	Provision of LGBT health services, provision of LGBT community programs	Local	100+
Toronto	Registered nonprofit	40	x	x	x	LGBT	Arts and culture	LGBT festival	Local	15-20
Toronto	Registered charity	26	x	x	x	LGBT, youth	Health	Provision of LGBT helpline and mental health programs	Provincial	10-15
Toronto	Registered charity	25	x	x	x	LGBT, ethnoracial	Health (HIV)	Provision of HIV services, sexual	Local	15-20

								health services, and GBMSM health programs		
Toronto	Registered charity	38	x	x	x	GBMSM	Health (HIV)	Provision of HIV services, sexual health services, and GBMSM health programs	Local	30-35
Toronto	Registered charity	8		x	x	LGBT	IRI	Provision of crisis refugee resettlement services	Internatio nal	10-15
Toronto	Registered charity	26	x	x	x	LGBT	EDI	Political, social, and legal HIV-related advocacy	National	10-15
Toronto	Registered charity	41	x		x	Mainstream	Health	Provision of LGBT sexual health services and programs	Local	25-30
Toronto	Registered nonprofit	10		x	x	LGBT	EDI	Provision of sexual and gender diversity workshops	National	3-5
Toronto	Registered charity	42		x	x	LGBT	Funder	Funder of LGBT community programs and projects	Local	1-3
Toronto	Registered charity	5			x	LGBT	IRI	Provision of crisis refugee resettlement services	Internatio nal	1-3
Toronto	Registered nonprofit	9	x		x	LGBT	EDI, community development	Capacity development for LGBT political candidates, associational activities	National	1-3

Toronto	Registered charity	33	x	x	x	GBMSM	Health (HIV)	Provision of HIV services and community programs	Local	15-20
Toronto	Non-registered nonprofit	31			x	LGBT, ethnoracial	EDI, community development	Political and social advocacy, provision of community programs and community space, associational activities	National	3-5
Toronto	Registered charity	35	x	x	x	Mainstream	Health (HIV)	Provision of HIV services	Local	40-50
Toronto	Registered nonprofit	15	x	x	x	GBMSM	Health (HIV)	Sector coordination	Local	5-10
Toronto	Registered charity	23	x	x	x	LGBT, ethnoracial	Health (HIV)	Provision of HIV services and community programs	Local	10-15
Toronto	Registered nonprofit	15		x	x	LGBT	Community development	Provision of sector development and philanthropic development programs and resources	National	1-5
Toronto	Registered charity	25	x	x	x	LGBT	EDI, community development	Political and social advocacy, development of sexual and gender diversity resources, provision of community programs and services	National	30-35
Toronto	Registered nonprofit	~25* (NGO is no			x	Lesbian and gay	EDI	Political and social advocacy	Provincial	5-10

		longer active)								
Toronto	Non-registered nonprofit	12			x	LGBT	EDI	Social advocacy, developing and maintaining an archive of liberationist politics	Provincial	1-5
Toronto	Non-registered nonprofit	15		x	x	LGBT	EDI, community development	Sector representation	National	5-10

Method

In this section, I first define some key terms crucial to my methodology, namely what constitutes an LGBT NGO in this thesis. I discuss my sample and issues of selection bias. I then outline my method of data collection via semi-structured in-depth interviews. I discuss issues of access, the make-up of the organisations interviewed, and my interview method. I outline how I analysed my data via thematic analysis, as well as data anonymisation and ethical issues I encountered in the research process.

To note, this thesis relies on one main source of data: semi-structured in-depth interviews conducted with leaders and high-level members of LGBT NGOs. My in-depth interview data was supplemented by press reports (i.e. news articles); organisational information obtained from NGO websites, including mission statements, descriptions of activities, and annual reports (where available) which outline financial information; and to a small degree, publicly available financial information pertaining to LGBT charities sourced from the Canada Revenue Agency website (based on filed T3010 registered charity information forms). This data was used to provide substantive empirical context for collecting and analysing my interview data. As organisation websites and documents may contain outdated information, data on organisational activities were corroborated with interview responses.

Defining LGBT NGOs

In this thesis, I define *LGBT NGOs* as *organisations which pursue missions and goals pertaining to LGBT issues, identities, and communities, or which have regular programming pertaining to the above*. This can take the form of advocacy, research, provision of social services or community space, or the production of arts and culture. This definition is broad enough to take into account organisational development. For instance, LGBT NGOs may begin as LGBT-oriented in mission, but their mandate may expand over time to include LGBT communities as only one demographic they serve—and vice versa. As such, this definition includes mainstream organisations whose missions are not LGBT-focused but who offer LGBT-oriented programs and services. Unless otherwise specified, my use of 'LGBT NGOs' refers to organisations with LGBT-focused missions and mainstream organisations offering LGBT-oriented programs and services.

I also use the terms LGBT NGO and LGBT organisation interchangeably. In this thesis, LGBT organisations are *nongovernmental* entities situated in the intermediate space between the state and market (Billis, 2010; Evers and Laville, 2004; see Chapter 2). This

conceptualisation utilises Evers and Laville's (2004) theoretical approach to the third sector as a space overlapping with the state and market, denoting areas where NGOs may resemble government or market organisations. Following Evers and Laville's (2004) third sector concept, LGBT organisations in this thesis are not necessarily not-for-profit. As I note in my discussion of NGOs in Chapter 2, this third sector concept is particularly useful to capturing both the evolution of organisational forms and the range of groups active in the Canadian LGBT NGO sector. Such groups include registered charities and nonprofit organisations, but also social enterprises and mutual aid or self-help organisations, both of which distribute profit amongst members. These organisational forms may exist alongside each other or constitute different phases of organisational development over the life course of the LGBT organisation.

In this thesis, my use of the 'Canadian LGBT NGO sector,' or the 'Canadian LGBT sector,' refers to the pan-Canadian intermediate space containing all LGBT NGOs located in the country, including domestic-focused and international-focused organisations. Nested within this space are smaller 'LGBT sectors' or 'LGBT NGO sectors' delineated by provincial/territorial geographic boundaries, containing LGBT NGOs located in the province/territory. Nested within these are local LGBT sectors (or LGBT NGO sectors) delineated by local geographic boundaries containing all LGBT NGOs located in the municipality.

Sample

My data sample is structured around my definition of LGBT NGOs but its boundaries evolved over the course of data collection. As mentioned, my definition of LGBT NGOs is intentionally broad, including organisations with LGBT-focused missions and those with mainstream programming pertaining to LGBT issues, identities, and communities (but whose missions are not LGBT-focused). This was the starting point for my sample of organisations. But as the number of mainstream organisations offering LGBT programs can be enormous, for feasibility I have only included mainstream organisations identified by my interview participants as major players in the LGBT sector (snowball sampling). These were primarily major players in LGBT service provision. I identified LGBT-focused NGOs through a web search of LGBT NGOs in each city through online community directories.

For comparability across organisations and cities, the sample was initially restricted to local-level LGBT organisations. However, early into data collection, it became clear that

in many cases, local services were provided by local-level organisations but also provincial- and national-level organisations (I discuss further this in Chapters 4, 5, and 6). Excluding these organisations because of scale would risk excluding key NGO figures in the local LGBT sector. Thus, I expanded my sample inclusion criteria to include provincial-level and national-level organisations—for feasibility, these only included groups identified by my interview participants as major players in service provision and advocacy (Kapiszewski et al., 2015). Effectively, my sample of LGBT NGOs was comprised of:

a) local-level LGBT-focused NGOs, identified by online search of LGBT NGOs in each city through online community directories;

b) 'major player' provincial- and national-level LGBT-focused NGOs, identified through snowball sampling;

c) 'major player' local-, provincial-, and national-level mainstream NGOs that offer LGBT-oriented service provision, identified through snowball sampling.

The leaders and high-level members of LGBT NGOs (e.g. executive level members, board members) were the main participants of interest in my sample. They were selected as they possess in-depth knowledge of the organisation, its management structure, sources of funding, factors affecting the NGO's sustainability, as well as knowledge of the organisation's history. Many leaders are founding leaders or long-time leaders of the organisation, which well-positions them to reflect on these issues over the course of or over a long period of the organisation's existence.

But to better understand the story of NGOs within their wider context, major high-level members of funders (e.g. board members, diversity and inclusion managers, executive level members) were also included in the sample. Admittedly, the inclusion of funders was prompted for the most part by happenstance. I was initially unsure about how useful funder insights would be to understanding LGBT organisations. However, my first interview with a high-level member of an LGBT community foundation had yielded surprisingly useful insights into the history of the city's LGBT sector, shifts in sector focus, and trends in corporate and government funding, which affect the sector's reliance on LGBT community foundation funding. After all, these community foundations are integral to the historical development of the LGBT sector. This led me to seek interviews with other LGBT community foundations in the cities under study to understand the landscape of the LGBT sector and its funding pressures.

In this same interview, my participant, unprompted, offered the contact information for a key corporate funder in the LGBT sector. Not really expecting a response, I decided to contact this funder and, while I was at it, I contacted other major corporate funders (provincial and national banks) identified by my NGO participants. I was cognizant that corporate participants may be guarded in their responses and that this may limit the usefulness of the data elicited from these interviews. But given that banks are an important funder of LGBT organisations in Canada, interviewing them would likely provide at the very least data about how they rationalise sponsoring LGBT groups, how they decide who to sponsor, and/or some insights into whether banks were reaching their 'ceiling' in funding these groups—whether the 'carrying capacity' of corporate funding was nearing. This data would supplement the perspectives of NGO participants regarding the role of the market in organisational sustainability. To my surprise, the interviews I was able to obtain with banks were incredibly useful and candid, providing insight into the personal and institutional motivations for funding LGBT organisations. Using the same logic for including corporate funders, I decided to try my luck with contacting provincial government funders to obtain data supplementing NGO perspectives on the role of the state in organisational survival.

LGBT community foundations were identified using a web search of online community directories. Corporate funders were identified by my NGO participants as being key funders. Government funders (provincial government) were identified by my NGO participants and a search of nonprofit funding programs on provincial government websites. While I contacted government funders by email, I was unable to gain access to these organisations: no government funders responded to my interview requests. However, in lieu of this, I was able to obtain panel data from major federal and Ontario government officials from a public conference on philanthropic development in the Canadian LGBT sector held in Toronto in April 2018. Indeed, the willingness of banks to participate in this study compared to government funders is perhaps a finding in and of itself, illustrating perhaps public relations-like motivations: the desire to further publicise the company's corporate social responsibility in the LGBT community and to dispel myths about it.

Importantly, however, I note that my interviews with NGO and funder participants do not elicit objective data. Their responses do contain personal and professional biases informed by their organisational/institutional context, personal opinion, and even their positionality as leaders and high-level members of their organisation. Interviewing NGO participants across a range of issue areas and organisational types, and interviewing

multiple community and corporate funders, to reach data saturation attempts to mitigate this by triangulating responses. However, the findings of this study and how they answer my research question should be interpreted with the understanding that they are drawn from the perspectives of organisational actors in specific social, political, and economic locations.

Selection Bias

Importantly, I note that due to non-response bias and having attained data saturation, my data does not completely capture the total population of local-level LGBT focused-NGOs. Nor is it a complete capture of the LGBT sector in each city. This limits my ability to speak about sector-wide patterns in each city. To some degree, it limits my ability to speak about patterns pertaining to populations of LGBT organisations in each city: for instance, the total population of LGBT charities, the total population of grassroots LGBT NGOs, or the total population of mainstream providers in the LGBT sector, etc. The findings in this thesis reflect the organisations interviewed for this doctoral study. However, the high response rate across issue areas and organisational type, and the opportunity to interview multiple current and past members of the same organisation (as I later discuss) enabled me to reach data saturation. This strengthens the reliability and plausibility of my findings to be able to provide insight into what might be happening elsewhere in the LGBT sector within each city, and in cities elsewhere within and beyond Canada, as I later discuss.

Indeed, the intent of this project was to interview the population of local-level LGBT organisations in Calgary, Toronto, and Montreal. However, some selection bias was inevitable and a finding in and of itself given the survival focus of this thesis: despite the high response rate, organisations under greatest survival pressure were unable to respond. Accordingly, many organisations that did not respond to my interview request were small and mid-sized organisations serving the most marginalised LGBT populations such as Black and African LGBT communities; trans people; LGBT refugees; and marginalised gay, bisexual, and MSM (men who have sex with men) populations in Black and African communities, Hispanic and Latino communities, and Indigenous communities.

While I generally had a high response rate, non-response bias meant that the sample may overrepresent organisations able to spare the time for an interview. This became clear through an email response I received from an interview participant who, while happy to sit down for an interview, reminded me that in a sector in which resources are overstretched

and NGOs understaffed, asking NGO service providers to sit down for even an hour is the equivalent of taking an hour out of serving their beneficiaries and thus a hefty request.

Data Collection

Gaining access: I identified my NGO interview participants via their organisation website. In most cases, I was able to email NGO leaders and high-level members (e.g. board members, executive-level members) directly. When this was not possible, I emailed the organisation's general email address and was directed to a high-level member who was happy to sit down for an interview.

Obtaining access to my corporate participants was more difficult, as corporate contact directories were not publicly accessible and I did not have contacts in the banking sector. In most cases, I scoured the bank's diversity and inclusion webpage to find a general email address to write to. Where possible, I emailed specific individuals (I expand upon this in Appendix 2). As such, my access was hit and miss. In two instances, this strategy was successful: my interview request was forwarded to an executive member and one CEO. In one instance, an NGO participant generously provided the contact information for his bank funder.

I used a similar method to reach provincial government participants. As I did not have contacts in the provincial government, I emailed the general address listed on the government nonprofit funding program webpage. I emailed specific individuals where possible. However, as noted earlier, I was unsuccessful in reaching any provincial government funders.

I contacted my interview participants via 'cold call' email to participate in an interview for this research project. In these email interview requests, I explained who I was, included a brief description of my project, and explained that I was interested in hearing more about the organisation and the participant's perspective in relation to my project. When contacting my participants, particularly my NGO participants, I kept the description of my project purposefully vague in narrative, and I made sure not to reveal any analytic hypotheses (Kapiszewski et al., 2015). I noted that the interview would take only 45-60 minutes of their time, to be conducted at a time and place convenient to them. I added that their responses would be included in my final thesis and some articles, which would be made available online for the public and policymakers to read. Where possible, I avoided mentioning in the emails the names of participants I had spoken with, as

interpersonal and interorganisational conflict was common amongst LGBT NGOs within the same city, but also occasionally between cities.

Interviews numbers and organisation make-up: To reach data saturation (Kapiszewski et al., 2015), I conducted 77 interviews (not including follow-up interviews) with 75 current and former leaders and executive members of 54 LGBT NGOs and 3 banks between September 2017 and May 2018 (see Appendix 1). This interview count includes 52 active LGBT NGOs and 2 defunct LGBT NGOs. Of the 52 active LGBT NGOs, 12 were mainstream organisations with regular LGBT programming such as HIV organisations and other health organisations, as well as one church. The LGBT NGO count includes registered charities, registered nonprofit organisations, non-registered nonprofit organisations, LGBT community foundations, and social enterprises. This further included advocacy organisations, service providers, cultural organisations, and professional associations. To provide regional case context, 2 interviews were conducted with a nonprofit scholar and the founder of a cross-country LGBT leadership training program; as the latter was not an organisation and was located outside of the cities of interest, it is not included in the NGO count.

In some cases, multiple members of the same organisation were interviewed. However, it is also common for LGBT NGO leaders/members to have previously served as leaders/members of other LGBT organisations of interest in the sector. Thus, my interviews with these individuals elicited in-depth data about the organisation they were currently at, in addition to data about other organisations that they had insider knowledge about (usually one other organisation). These latter instances provided valuable windows of observation for previous periods of the organisation. This was especially useful as nonprofit sectors tend to have high staff turnover, such that some of the current leaders I interviewed had been working at the organisation for as little as 6 months. Accounts from former leaders/members enabled me to fill in gaps in my observations of the organisation, providing a more detailed picture useful to my research objectives. As such, where interview participants provided substantial, useful insights about the workings of other LGBT organisations of which they were simultaneously or formerly leaders/members, these accounts were counted as separate interviews—that is, one interview per organisation. This was the case for 9 interview participants, who were current leaders of 10 LGBT organisations and who were also former leaders or members of 6 additional LGBT organisations. The scope of diverse participant perspectives that I was able to obtain increases the reliability and plausibility of my conclusions.

Interview method: Developing knowledgeability of the organisation and the individual where possible prior to the interview was important to acquiring trust and establishing rapport with all interviewees (Rubin & Rubin, 2012; DiCicco-Bloom & Crabtree, 2006). This enabled me to gather very useful in-depth data to help answer my research question. However, this was especially important and useful in my interviews with corporate participants—elite interviewees where a power imbalance exists between researcher and interviewee (Mikecz, 2012).

Most interviews were conducted in person, at a place of the participant's choosing (usually a coffee shop or the participant's office). A small number of interviews were conducted via phone or Skype. Interviews typically last 45 minutes to an hour (though were as short as 20 minutes long in the case of phone interviews with elite participants, and as long as 2.5 hours). In accordance with LSE ethics protocol (ethical approval was issued by the LSE Research Ethics Committee on 31 August 2017 – ethical approval ref. 000604), I began the interview by introducing myself, describing the purpose of the research project, explaining that all participant and organisation names would be anonymised, and that the participant was free to withdraw from the study at any time. I then sought both verbal and written consent. In all three cities, all interviews were conducted in English. While this was not a problem for the conducting of interviews in Montreal, where most LGBT organisations have bilingual leaders and/or employees (I discuss this further in Appendix 2), this may have contributed to non-response bias for primarily French-speaking LGBT organisations in the city.

During all interviews, I first asked participants about themselves and what led them to their current position at the organisation. In order to explore how organisations survive after policy shift, and the impact of policy shift itself on organisations, I sought to understand what types of organisational pressures LGBT NGOs were facing in the post-same-sex marriage legalisation context; what the sources of these pressures were—with particular attention to political, economic, and sociocultural forces; whether these pressures affected organisational persistence, adaptation, and/or transformation; and whether same-sex marriage legalisation factored into the nature and degree of these organisational pressures.

To gain data on these themes, I arrived at six main interview topics (Rubin & Rubin, 2012):

1) what the organisation does

2) how the organisation operates (e.g. its structure)
3) organisational interactions with other LGBT NGOs in the sector (to elicit data on inter-organisational relations: e.g. partnerships, competition)
4) how the organisation is funded—which was further broken down into questions around sources of and constraints around state funding, private sector funding, third sector funding (other NGOs), and individual donations
5) what success is for the organisation
6) and the future of the organisation

Throughout, I inquired as to whether, and if so how and why, the organisation experienced change in any of the first four areas. I arrived at these main interview topics (see Table 3.1) after modifying earlier variations over the course of initial interviews to better elicit data that would answer my research question (Rubin & Rubin, 2012). During the interview, these main topics were subsequently supported by follow-up questions specific to what interviewees discussed. The wording and order of the interview topics differed slightly for each interview to facilitate a conversational flow and to fit the direction of the interview. However, the interview topics were the same for each interview, as summarised in Table 3.1.

The interview topics were intentionally broad and open-ended to allow interviewees to bring up and explore other issues related to the interview topics, based on their interest and knowledge (Rubin & Rubin, 2012). Many of these digressions proved productive and important to my study. The flexibility of and topics in this interview guide enabled me to gain insight into my themes of interest: whether survival pressures exist in the post-same-sex marriage context, the nature of these pressures, how these pressures affect the organisation and the sector on the whole, and how the organisation has adapted to these threats. This data enabled me to answer my research question. This is summarised in Table 3.1 below:

Table 3.2: Deriving Interview Topics (Interview Guide) from the Research Question

Research Question	**Thematic Components of the Research Question**	**Research Themes of Interest**	**Interview Topics (Interview Guide)**
How does progressive policy shift affect	The impact of progressive policy	Types and sources of pressures LGBT	What does your organisation do? Changes in this?

organisational survival?	shift on organisations How organisations survive after policy shift	NGOs face after same-sex marriage Whether these pressures affect survival, adaptation, transformation Whether same-sex marriage factors into these organisational pressures	How does your organisation operate (what is the structure like)? Changes in this?
			Does your organisation interact with other LGBT groups? What is your relationship with these groups? Changes in this?
			How is your organisation funded? Constraints in these funding sources? Changes in this?
			The future of the organisation?
	The impact of progressive policy shift on organisations	What does it mean for an organisation to get what it wants? Does same-sex marriage or LGBT equality factor into this?	What is success for your organisation?

For my interviews with banks, the focus of the interview was different. Interviews with diversity and inclusion managers and high-level executives in the banking sector could potentially illuminate the donor context of the growing—yet plateauing—supply of corporate funding to the LGBT sector. As such, these interviews revolved around one main theme: what prompts the bank's corporate giving to LGBT NGOs? This interview topic was supplemented by the following topics: how did the bank's corporate sponsorship of LGBT NGOs begin? How do you decide who and what gets funded? Do you foresee any changes in the current level of sponsorship of LGBT organisations?

As interviews drew to a close, I asked my NGO and corporate participants what 'success' was for their organisation, and what they saw for the future of the organisation. This provided insight into how organisations themselves conceptualise 'getting what they want' and how this might differ depending on what the organisation does, but also endogenous and exogenous conditions such as organisational legitimacy, resource capacity, and political and economic forces. These responses provided crucial data to developing a more nuanced understanding of what it means to get what organisations want, and how this is connected to issues of survival. In addition to signalling to the participant

that the interview was coming to a close, the question about the organisational future enabled me to understand organisational perceptions of long-term persistence—and how these might similarly differ depending on structural and organisational conditions. While instrumentally important to answering the research question, interviewees also seemed to genuinely enjoy answering the questions around success and the future, which additionally made for a positive interview experience.

I recorded all of my interviews using written field notes, without the aid of an audio recorder (I expand upon the benefits of this in organisational research in Appendix 2). Field notes were typed up immediately after into a word processor (Microsoft Word), producing a corpus 502 pages long. These field notes contained a non-verbatim transcript of each interview, including a number of verbatim interview quotes, as well as memos capturing my thoughts and interpretations during the interview and in the process of transcribing my interview notes. Halcomb and Davidson (2006) detail the value for data interpretation of written field notes or memos taken during or immediately after the interview. The data for this thesis will be archived on the UK Data Service ReShare repository.

Data Analysis

I used thematic analysis to analyse my interview data. This was done without the use of software. Drawing upon Attride-Stirling's (2001) thematic networks approach, I first developed a coding framework based on six broad thematic areas of interest. These thematic areas were based on the theoretical interests guiding my research question as well as issues arising from the data itself. These included:

1. what constitutes getting what an organisation wants
2. whether and how same-sex marriage (or policy shift, or external change more broadly) affects organisational survival
3. structural factors affecting NGO survival
4. organisational factors affecting NGO survival
5. how organisations respond to survival pressures (e.g. adaptations)
6. and processes of resource dependence and resource mobilisation.

I then applied the coding framework to the data, organising text segments based on the codes.

Next, I identified themes in the coded data. This was an iterative process of abstracting themes from the coded text, rereading coded text segments in the context of the

codes and themes, and refining the themes. The process of repeated reading and rereading of the coded text allowed me to gain sufficient in-depth familiarity with each of the cases as standalone cases before performing within-case and cross-case analysis (Eisenhardt, 1989). I then constructed the thematic networks by organising the themes into clusters of lower-order 'basic themes' organised around larger issues ('organising themes') (Attride-Stirling, 2001). In my cross-organisational analysis, I was especially interested in examining how characteristics of different types of NGOs (e.g. charities, informal grassroots groups) facilitated or precluded certain adaptations. These characteristics included informality, age, funding, and size. In my within-case and cross-case analysis, themes of regional cultures, provincial welfare state orientation, and the makeup of local industries were of particular interest as structural factors affecting NGO persistence.

Finally, I summarised the main findings of these thematic clusters and the relationships between multiple clusters to deduce 'global themes' (Attride-Stirling, 2001). I then went back to the data to ensure that this thematic network and the order of global themes, organising themes, and basic themes reflected the data and were supported by the data. The finalised global themes are the basis of my analytical framework. Yet, in the vein of Symon and Cassells (1998), I note that while I present my analytical process as sequential here and as separate from data collection, the actual process of analysis was more iterative. Indeed, the process of data analysis began during the process of data collection as I modified interview topics to better fit my research objectives, recorded field notes/memos during the interview and during data transcription, and even continued during the process of writing up my findings (Symon & Cassells, 1998; Potter, 1996).

Anonymisation of Organisations

All organisations have been anonymised in this thesis. To differentiate them, and when necessary, I identify them based on organisational prominence, size, age, and defining features such as specificity to certain LGBT or ethnoracial groups. This is in addition to identifying them based on what they do (i.e. issue area). However, some organisations are particularly well-known and, as such, they may be identifiable from the analysis despite being anonymised. Similarly, the identities of many organisations will be apparent to those with in-depth knowledge of the LGBT sector in each city. As such, I have also anonymised the individuals interviewed for this thesis and identify them as leaders, executives, or members of the organisation.

Ethical Issues

As noted earlier, the primary ethical issue that became apparent in data collection was the interview request itself: for many under-resourced NGOs operating at or beyond capacity, taking the time to participate in my research project ultimately diverted time and human resources away from NGO activities, including serving vulnerable groups. I was especially cognizant of this issue in Montreal, where LGBT NGOs are inundated with interview requests from postsecondary students. To mitigate this issue, I emphasised to my participants that my findings would be made available to LGBT NGOs and policymakers to inform current and future decision-making in the LGBT sector and policymaking more broadly. Indeed, at baseline, my findings will provide LGBT NGOs in each city with a much-needed sector-level view of their work that is absent in current research. This includes research on funding patterns, survival pressures, the costs and benefits of a range of adaptations (e.g. as a guide to organisational strategy), and trends in organisational development within and across cities. As I discovered during my interviews (and as I discuss in my empirical analysis), LGBT NGOs are so focused on surviving for the immediate term and have become so atomised that they are not always aware of developments in the LGBT sector happening in their own city, let alone elsewhere in Canada where they may seek to cultivate or strengthen interorganisational ties.

My mitigation strategy appeared to work well, as evidenced by the high response rate to my interview requests and the interest that my participants expressed in my early findings. During the interviews, all of my participants were eager to learn about my findings from their city and especially in comparison to other cities—a testament to the lack of current research in this area. One participant even invited me to share my preliminary findings with other NGO leaders and funders at a conference on philanthropic development in the Canadian LGBT NGO sector—an opportunity for which I am most grateful. To avoid influencing the interview data, I shared some early hypotheses and findings with my participants after the interview. This strategy often generated even more useful insights in addition to providing something immediate in return for my participants' time.

Relatedly, I am convinced from the length, detail, and candidness of many of the interviews that the interview experience in and of itself may have been useful for my participants. On the one hand, some participants expressed that the issues they were discussing were those that they had not reflected upon in some time, and that it was a useful intellectual and reflective exercise. For other participants, the tone of the interview

veered frequently in the direction of a sort of confessional, where participants seemed eager to speak candidly on issues that they might otherwise avoid discussing with sector colleagues. I believe that speaking to an outsider such as myself gave many of my participants the space to vent grievances; it also provided the opportunity to posit their own theories about the workings of the LGBT NGO sector and of government and corporate funding to an interested party.

In this vein, however, the candid views expressed by some participants may have unintended implications for personal or organisational legitimacy, or for inter-organisational relations. As such, they were included in my analysis insofar as they are useful and important to illuminating the themes, research question, and research puzzle in this thesis. This was done with careful deliberation. As noted earlier, I have made my best efforts to protect the identities of participants and organisations by anonymising all names.

Positionality

Finally, my own positionality as an Anglophone visible minority researcher may have affected the research process for this doctoral project. In some cases, my positionality foreclosed opportunities for data collection. In most other cases, however, I found that it either opened doors to collect richer data or potentially skewed the data to emphasize diversity and inclusion themes.

In Montreal, the indication in my interview request emails that the interviews would be conducted in English signalled to potential participants that I was an Anglophone researcher. On the one hand, not having a common French linguistic and cultural background – i.e. 'being able to speak their language' – may have turned off some Francophone LGBT organisation leaders. As I discovered in several interviews, even bilingual Montreal participants expressed frustration, tension, and even hostility towards Anglophone counterparts in English Canada. Extending such sentiments to myself as an Anglophone researcher, this may be a factor which played into my non-response bias for Francophone LGBT organisations.

On the other hand, not having a common cultural or linguistic background did open doors in other cases in Montreal. I found that the Francophone/bilingual participants I managed to interview were more willing to go into detail to explain the social, cultural, and historical roots of Québécois regionalism precisely because they perceived me to be an outsider. This was enormously beneficial in understanding the sociocultural and political context of LGBT NGOs in Montreal.

Similarly, as previously noted, being a researcher outside of the LGBT NGO sector more broadly may have provided benefits in eliciting rich data. In my contact with participants and during interviews, I presented myself as an outsider to the sector but one with a deep interest in the inner workings of the organisations, the sector, and how organisations navigated organisational, societal, state, market, and policy pressures. With no previous work or volunteer experience in the LGBT NGO sector, this was not very difficult. I sought to minimize the researcher-participant power imbalance with NGO participants by avoiding jargon and keeping my interview tone as conversational as possible. Like the Montreal interviews, I found that my outsider status provided the impetus for my participants to go into greater contextual detail in their responses so that I would fully understand their perspective. It also enabled my participants to be much more candid about their frustrations with other organisations, because as an outsider and having assured data anonymity, they may have perceived little risk that their words would find their way back to their peers.

But the most obvious impact of my researcher positionality was with respect to being a visible minority: that is, a woman of colour, specifically East Asian descent. This is best illustrated by a moment during an interview with a community development organisation leader in Montreal. At one point during the interview, the topic shifted to issues of diversity and inclusion without my prompting. My participant began to explain how hiring diverse staff members and board members was important to him personally. To show this, he took out his cell phone and began to show me photos of specific board members of colour, and especially women of colour. I immediately wondered if my participant would have broached the topic of diversity and inclusion and gone to such lengths to prove that he and his organisation were committed to these ideals if I were not a woman of colour. Upon reflection, I wonder if topics of equity, diversity, inclusion, and intersectionality would have also come up in other interviews—either in such depth, or even at all—were it not for my own positionality. Indeed, the perception of my participants may have been that as a woman of colour doing LGBT-related research, I would have simply expected such discussions. As such, it is possible that my data—from both LGBT organisations and corporate participants—may overemphasise just how committed these organisations are to equity, diversity, and inclusion ideals. The reality of these organisations in practice may or may not in fact be different.

Generalisability of Findings and Bounds of Case Study Applicability

My comparative case study research design and qualitative methodology enable me to capture in in-depth detail a range of possible ways that policy shift might affect different types of LGBT NGOs in diverse sociocultural, political, and economic contexts. This allows me to make contingent generalisations of my findings to contexts similar to the LGBT NGO case under study (Gerring, 2001, 2007a; George & Bennett, 2005). I emphasise that the potential to generalise from my findings is *contingent* upon the similarity of the organisations and contexts to which my findings could be applicable (George & Bennett, 2005). As my data is not a complete capture of the LGBT NGO sector, my ability to generalise to other populations of organisations is limited. Thus, I seek to generalise to other similar cases of organisations. The more similar they are, the greater the possibility that my findings may be generalisable to these organisations and contexts. But I note that this does not guarantee that the generalisable findings may indeed provide useful insights to these other units of analysis.

Indeed, due to the empirical specificity of my crucial diverse case study research design, some findings are specific to the case of LGBT NGOs and the Canadian cities under study. For instance, the issue of resource dependence is particularly heightened and salient for NGOs, which may impact the generalisability/usefulness of my findings around resource dependence to other non-NGO organisations. Issues of survival such as the need to survive and adapt may also be particularly salient to LGBT NGOs as they are identity-based social organisations; as such, actors within and outside the organisation such as members, employees, the community, and political elites may be particularly invested in the continued persistence of these groups as symbols of group identity and culture. My findings around survival and adaptation may therefore translate less directly to non-identity-based social organisations or organisations more broadly, where the issues at stake in continued persistence differ. As I noted in Chapter 2, my findings around survival may be most directly applicable to organisations which pursue long-term survival as a goal, with weaker applicability to organisations with intendedly short lifespans. Further, the impact of same-sex marriage legalisation on LGBT organisations in the Canadian context may not translate neatly to jurisdictions where LGBT rights and livelihoods continued to experience significant setbacks even after marriage.

As such, I outline below the *possible* types of cases to which my findings *may* be generalisable, from most to least direct applicability. Most closely, my findings are most relevant to understanding goal attainment in NGOs/organisations pursuing discrete policy

change and in NGOs/organisations where missions evolved from pursuing discrete policy issues to substantive policy areas/fields (see Chapter 1). Additionally, my findings may be most relevant in policy domains where the policy goal is within reach (politically and structurally feasible), and less relevant to NGOs in policy domains where the ultimate goal is far off—such as in poverty alleviation, migration, access to housing, or climate change. While I examine cities in this thesis, my findings are not restricted in applicability to other cities. Rather, these cities function as sites to observe the phenomenon of interest and the factors at play: the complex policy challenges, population density, and diversity of major urban centres are likeliest to produce organisational behaviour which makes the dimensions of interest most visible (Hubbard, 2018). While these dimensions may be at play elsewhere, they may not be as visible in smaller locales with less population density, less diversity, and smaller populations of LGBT NGOs.

Thus, my findings around how same-sex marriage legalisation affects LGBT NGOs may be most closely applicable to NGOs in other jurisdictions that have gained 'pinnacle' human rights policy shifts. A prime example is the legalisation of same-sex marriage or same-sex domestic partnerships, which caused the closure of LGBT NGOs such as the American Foundation for Equal Rights, the Religious Coalition for the Freedom to Marry in Massachusetts, and the Gay Initiative in the Czech Republic (Riley, 2015; Washington Blade, 2015; Hildebrandt, 2018). In the UK, it resulted in the shift in mission of Stonewall, a major LGBT rights organisation—a shift in mission from pursuing the discrete policy issue of same-sex marriage to the broader policy area of eradicating homophobia in society (Hildebrandt, 2018).

My findings around how progressive external changes (e.g. events) affect NGOs may next be applicable, but less directly so, to other cases where ostensibly progressive change can complicate the lives of NGOs, such as policy victories, social or political change, scientific discoveries, or the winding down of crisis situations. Of course, there will be conflicting views on what constitutes 'progressive change.' In my definition, the change is progressive for a particular group or organisation insofar as it advances one or more of their goals (see Chapter 2). As such, what these interested parties would consider progressive change may not be progressive change for other groups.

Examples of such progressive change impacting the lives of NGOs include the impact of policy victories on political organisations (i.e., achieving discrete policy goals—see Chapter 1). For instance, the legalisation of recreational cannabis in Canada accomplished a key party platform of the Marijuana Party of Canada but pre-empted

debate over its more liberal proposals for the sale and regulation of recreational cannabis (Kassam, 2018). Similarly, after the successful 2016 referendum ('Brexit') vote paved the way for Britain to leave the European Union, the UK Independence Party (UKIP) came face to face with an existential crisis. Not only was one of its primary goals achieved, but policy victory led to the emergence of a rival Brexit Party formed out of frustration with the government pace around Brexit (Walker, 2019; Payne, 2018).

In an illustrative example of socio-political change affecting NGO livelihoods, three years after organising the inaugural Women's March on Washington to protest the 2016 election of US President Donald Trump, the Women's March organisation struggled to remain relevant. The organisation had successfully mobilised scores of its participants to create transformative social change in the public sphere. The problem? Members and participants left the organisation to start their own groups, join political campaigns and activist groups, and run for office (Lang, 2020). The Women's March organisation effectively depleted its own ranks when it got what it wanted, resulting in a declining base of support. In another example in which my findings are applicable but less directly so, the winding down of crisis affects the continued persistence of disaster relief organisations established with the short-term purpose of providing immediate aid—for instance, crisis response groups formed in the wake of the 9/11 terrorist attacks and Hurricane Katrina (see Campbell, 2010).

Finally, as the findings of this thesis pertain specifically to NGOs, broad pattern findings around how progressive change impacts resource dependence, resource mobilisation, and adaptation may be indirectly applicable to other types of organisations dealing with progressive change, such as government and private sector organisations. I have outlined some examples of such groups in Chapter 1.

Conclusion

In this chapter, I outlined the research design and methodology used to answer my research question. I constructed a comparative case study research design of diverse crucial cases: LGBT NGOs in Calgary, Montreal, and Toronto in the context of long-term same-sex marriage legalisation. In the post-marriage context, LGBT NGOs are a crucial case of—or integral to demonstrating—the impact of progressive policy change on organisational survival. The multiple roles and issue areas in which LGBT NGOs are active provides the opportunity to observe the various pathways via which policy shift can affect

sustainability. This is coupled with their embeddedness in diverse city environments in Canada, where distinct regional forces shape organisational characteristics, behaviour, and livelihoods. Diverse cases, Calgary, Montreal, and Toronto offer a range of social, political, and economic dimensions which produce distinct environments valuable to examining how progressive policy change affects organisational survival. Having legalised same-sex marriage in 2005, the Canadian context offers a long period of time in which this policy shift could have impacted the livelihoods of LGBT NGOs. Examining a range of LGBT NGOs—including actors such as service providers which we would least expect to be affected by same-sex marriage—in Calgary, Montreal, and Toronto may therefore offer the strongest support for my contention in this doctoral thesis that progressive policy shift can shape organisational livelihoods.

Having constructed my research design, I then offered some empirical context for my research design. This sub-section draws from preliminary interview data, organisational website data, and publicly available organisational financial information. It illustrates some indicative themes of interest, exploring the types of issues that LGBT NGOs address in the post-marriage context in Calgary, Montreal, and Toronto. It also presented cross-case patterns and differences in the type, size, and wealth of organisations found in each city, indicating the role of structural forces and organisational factors in the context of long-term policy progress. This sub-section sets the scene for the subsequent empirical chapters.

Next, I discussed the qualitative methods used for data collection and analysis. I provided a definition of LGBT NGOs, outlined the sample, the method by which I conducted the semi-structured in-depth interviews, and the method by which I analysed the interview data thematically. I also discussed issues of selection bias, data anonymisation, ethical issues, and issues of my own researcher positionality which I encountered in data collection and reporting of findings.

I then discussed the generalisability of my findings and the bounds of case study applicability. I outlined what makes generalisability possible for my findings and discussed the limitations of this. I mapped the possible range of generalisability, providing empirical examples to illustrate the contexts in which my findings may be relevant.

Having discussed how I went about answering my research question, I now turn to my empirical analysis of the data collected for this doctoral study. In the following chapters, I present my findings which shed light on my research question and puzzle of

interest. In the next chapter, I examine the role of structural forces on the conditions for survival after long-term same-sex marriage legalisation.

4. The Impact of Structural Forces on the Organisation

"It's a question of history… We're trying to find our place in a big country… There is a need to identify ourselves culturally and what we are as a society and what we want to become." (Bank executive, Montreal, Interview 75)

*

"My experience in the HIV sector has taught me that government funding can shift, and so you can't rely on it." (IRI NGO leader, Toronto, Interview 51)

*

"In the last three to four years, LGBT funding from corporate donors has skyrocketed. In the last three years, oil companies have become involved, which you would never have seen before this. Even five years ago, this would have been strange." (Community foundation board member, Calgary, Interview 2)

*

In this chapter, I examine the structural forces affecting the conditions for organisational persistence after long-term progressive policy shift—a policy change which advances one or more of an organisation's stated goals (I refer to this interchangeably as 'progressive policy shift,' 'policy shift,' 'policy change,' and 'policy progress'). Societal, state, and market forces—independent of and those related to progressive policy change—are interdependent factors which affect the availability of necessary resources and the capacity for organisations to mobilise these resources. These structural forces reflect social, political, and economic ecologies that are the product of developments at the local, provincial, and regional levels and interactions between these levels and the federal government. The impact of provincial/regional-federal relations on producing the structural forces at work in each case is most evident in Calgary and Montreal, where—as I demonstrate in the subsequent sections—federal disenchantment and anti-federal sentiment has historically and continues to be a part of Western regionalism and Québécois regionalism. Long after progressive policy shift, I show that these structural forces create opportunities and constraints for organisational continuity. I show that in some instances, policy progress results in the evolution of these structural forces in ways which may compromise NGO sustainability.

First, I examine the role of societal forces in influencing the role, behaviour, and environment for LGBT organisations across cases. Western regionalism in Calgary, Québécois regionalism in Montreal, and identity politics in Toronto create opportunities

and constraints for resource mobilisation and resource dependence. Donor behaviour, shaped by territorial-based regionalisms and territorial-based giving norms, directly affects available revenue for LGBT NGOs. This underlies regional patterns in NGO revenue makeup and resource mobilisation strategies across cases—patterns which are further affected by state and market forces.

I next explore the state forces affecting organisational survival. I focus on factors such as the shift towards more restrictive project-based funding models, geographic scale-based constraints around funding eligibility, and policy devolution across political scale. Using the federal LGBTQ2 Special Advisor and Secretariat as an example, I show how political scale can create unmet expectations for funding, with implications for heightening existing attitudes of federal disenchantment in regions far from the political centre. In each province, bureaucratic inertia in state entities and state-sponsored entities buffer LGBT NGOs from environmental selection pressures. Counterintuitively, and challenging much of the literature on inertia in organisations, I demonstrate the benefits of bureaucratically inert institutions in ensuring vital streams of NGO funding. Ultimately, however, these benefits are contingent upon *lack* of government reform.

Finally, I examine the role of the market for the continued persistence of LGBT organisations following same-sex marriage legalisation. I demonstrate that the availability of corporate funding and the desire for NGOs to pursue it is structured by societal and state forces across cases, coupled with the landscape of corporate headquarters. I discuss the desirability of corporate funding for LGBT NGOs, the drive amongst corporations to fund these groups, the impact of the corporate shift towards 'ethical' funding practices, and the regional politics of relying on corporate funding to do social good. Expanding our understanding of corporate social responsibility, I highlight the role of elite actors and sociocultural norms in the corporate drive to sponsor LGBT programs and organisations.

Ultimately, I show that structural forces create opportunities and challenges for NGO resource availability, resource dependence, and resource mobilisation across cases. These findings indicate the impact of progressive policy shift on NGOs working in the LGBT policy domain, where policy change interacts with and may shape the sociocultural, political, and economic forces acting upon NGOs. As I illustrate in the next chapter, these forces complicate the heightened resource dependencies of LGBT organisations in the post-marriage era.

Societal Forces

This section explores the role of societal structures in shaping persistence long after progressive policy change. Regionalism and donor behaviour—as forces which affect the local, regional, and provincial environment and policy ecology in which LGBT NGOs operate—are shown to affect resource mobilisation practices and resource availability.

Western Regionalism in Calgary

Grounded in populist political conservatism, libertarianism, and moral conservatism, 'western regionalism' characterises social attitudes and politics in Alberta, shaping the context in which LGBT NGOs operate. Western regionalism is a place-based ethos highlighting individual rights, freedom, and 'individual responsibility,' characteristic of the mountains and plains regions of Western Canada and the American Mountain West (Wesley, 2011; Caughey, 1959; Ashley & Alm, 2015). In Alberta, it takes on a paradoxical behavioural and moral code: "people should be free to do pretty much as they like, as long as they look out for themselves… and, of course, behave" (Banack, 2013, p. 242). NGO leaders and provincial funders referenced this variously as the "entrepreneurial spirit," "prairie mentality," and "maverick character" (Interviews 2, 3, 4, 16, 23).

Western regionalism in Alberta shares similarities with the Western regionalism of other areas bordering the Rocky Mountains in the 'North American West,' including Idaho, Montana, Wyoming, Arizona, Colorado, Nevada, and New Mexico (Ashley & Alm, 2015; Caughey, 1959). With shared mountain and plains geography and climate, the North American West is characterised by common tropes of rugged individualism and deep ties to the land (Ashley & Alm, 2015). There is a deep suspicion of government and a sense of social and political isolation from the federal centre, known in Alberta as 'western alienation' (Ashley & Alm, 2015; Sayers & Stewart, 2013; Henry, 2002; Lawson, 2005).

In Alberta, western regionalism is marked by the historical social and political development of the province. According to Wiseman (2010), Alberta politics has a radical populist element which stems from early American settlement in the province from the American Mountain West states. As Banack (2013) notes, Alberta politics is therefore heavily influenced by American republican political thought, a phenomenon which is not seen elsewhere in Canada. Unique in Canada, the right wing has further dominated provincial governance in Alberta, with the Progressive Conservative Party ruling for four decades until 2012. Indeed, through the 1990s and into the 2000s, the provincial electorate has been strong supporters of political parties representing a combination of free

enterprise, private sector development, entrepreneurship, a strong work ethic, opposition towards state regulation, and antagonism towards changing social codes (Rayside, 2008; Wesley, 2011). But while anti-government attitudes are prominent, they are balanced by generally liberal spending on health and education, and support for government intervention on environmental protection and energy control (Wiseman, 2013; Stewart & Sayers, 2013).

The influence of western regionalism in political institutions and social norms is evident in Calgary's LGBT NGO sector. For nearly four decades, the provincial Progressive Conservative Party pursued a Christian evangelical-influenced policy agenda (Fierlbeck, 2006) either explicitly anti-gay or indifferent to LGBT issues. Coupled with this, Calgary's history of homophobia, reflecting social attitudes in Alberta, precluded the formation of a gay village populated by LGBT NGOs otherwise seen in major urban centres such as Toronto, Montreal, and Vancouver.

Moreover, as NGO leaders noted, there was no government interest in funding LGBT NGOs before same-sex marriage legalisation and no interest afterward until provincial and local regime shifts in the early and mid-2010s—but even greater government will was limited by capacity. At the local level, the election of Mayor Naheed Nenshi in 2010, the first Muslim mayor of a large North American city, signalled a new openness in local politics to diversity and inclusion. Participants noted that Nenshi was the first Alberta politician to march in the annual Pride Parade, a game-changer that for the first time lent political support for the LGBT community and by extension the work of its NGOs (Interviews 5, 9). This produced a more favourable regulatory environment for organisers of LGBT arts and culture events, eventually leading to municipal funding for such events for the first time (Interviews 5, 18).

At the provincial level, three decades of conservative administrations shifted to a social democratic administration in 2015 with the election of Premier Rachel Notley of the New Democratic Party. Participants reported that while the new social democratic administration represented new provincial government interest in funding LGBT NGOs—a first—in practice, this made little difference (Interviews 6, 9, 14). Limited social spending characteristic of the lean frontier state and a volatile oil and gas-based economy minimised state capacity to fund NGOs. Effectively, according to my participants, it did not matter if the province was finally receptive to funding LGBT organisations, especially during the tenure of the social democratic New Democratic Party from 2015 to 2019: the administration's hands were tied by the province's boom and bust economy (Interviews 6,

9, 14). As such, the city's minimal number of LGBT organisations cannot be explained solely by its smaller LGBT population.

But western regionalism has also been the driver of LGBT NGO formation despite unfavourable conditions, shaping NGO behaviour and preferences. A community funder board member explained:

> Calgarians see themselves as the city with the entrepreneurial spirit and know-how to get things done. There's this myth of it being the Wild West city… and whether or not this is true, Calgarians pride themselves on this. If they see that something needs to be done, they go and do it. Other cities might look and see that what they need isn't there and go 'oh well, I guess that's it.' In Calgary, we just do it. It doesn't matter if we're a small city or it hasn't been done before. We don't let that stop us. We just make it happen. And we cut out government if we need to. (Interview 2)

Reflective of western regionalism, there is a strong proclivity amongst LGBT NGOs for circumventing the state, a product of path dependence and limited state will and capacity to fund LGBT organisations. Thus, in the contemporary context, the notion of pursuing government funding is simply "not on the radar" of most LGBT NGOs in Calgary (Interviews 3 & 2). Effectively, both the historical and contemporary provincial policy ecology, which is shaped by provincial and regional interactions with the federal centre through Western regionalism, has heavily impacted the environment in which LGBT organisations operate to the point of affecting preferences for resource mobilisation. This contrasts sharply with the Toronto and Montreal cases, shaping the economic makeup of Calgary's LGBT organisations.

This finding also challenges existing assumptions in the scholarly literature on Alberta politics, which contends that populism and western alienation are less likely in the province's urban centres (Sayers & Stewart, 2013). A look at the language and behaviour of NGOs reveals that these aspects of western regionalism are in fact prevalent. Moreover, they shape the possibilities for resource mobilisation and subsequently NGO capacities to engage in advocacy, community development, and service provision.

Québécois Regionalism in Montreal

> *"There is a fear from some French that if you speak English, you will lose your Québécois identity and culture." (Queer Women's EDI NGO leader, Montreal, Interview 33)*

*

Similar to Calgary, regionalism also shapes the conditions for survival for LGBT NGOs in Montreal. In contrast to the Calgary case, however, regionalism facilitated an expansion of the LGBT sector in Montreal after same-sex marriage legalisation. While seemingly beneficial, regional sociocultural forces guide the discourses and behaviour of NGOs to simultaneously configure NGOs as agents of sub-state nationalism and to be highly resource-dependent upon the provincial state.

Québécois regionalism is deeply embedded in the history of Quebec as the home of the French Catholic minority in Canada (Zubrzycki, 2016; Dumont, 1993; Bouchard, 1999). It is exemplified in nation-building imperatives rooted in the Quiet Revolution, a sociopolitical movement from 1960-1970 in which Premier Jean Lesage's Liberal Party sought to remake Quebec into its own self-sufficient French-speaking nation—one that simultaneously shook off the Catholic Church's centuries-long control of state and society in the province and distanced itself from the political control of the federal government (Zubrzycki, 2016). French Canadianness, a pan-North American ethnic identity based on language and religion, was reconfigured as *Québécois*, a civic and secular identity centred around language and one circumscribed by the territory of Quebec (Zubrzycki, 2016). As Béland and Lecours (2005) note, "being Québécois means speaking French and also espousing equality, solidarity, and social justice as core political values" (687).

The Quiet Revolution entailed the secularisation of the Quebec state through the transfer of social services to the provincial government and the construction of a welfare state (Zubrzycki, 2016). It also saw significant regional economic development that created employment opportunities for Francophones previously marginalised in the workforce (Zubrzycki, 2016). Quebec pursued a neo-corporatist strategy in which the state maintained close cooperative ties with private business, in many cases buying them out and nationalising them, in effect controlling regional economic development as a means to secure functional autonomy for the province (Keating, 1999; Courchene, 1990). These political and economic developments lay the groundwork for separatist nationalist politics epitomised by two failed provincial referenda to de-federate from Canada (Rocher, 2002). In the contemporary context, separatist politics has waned in favour of a Quebec nationalism seeking to preserve the French language and Québécois culture, though the anti-federal bent to the nationalist politics varies with the government in power (Zubrzycki, 2016; Keating, 1999).

Similar to the Calgary case, as a product of sociohistorical and policy developments at and between local, provincial, and regional, and federal levels, Québécois regionalism

shapes the environment in which LGBT NGOs operate. Indeed, Québécois regionalism informs the role of LGBT NGOs in political and social governance, underlying the province's strong willingness and capacity to fund LGBT NGOs. Within Quebec's corporatist structure, third sector organisations relay societal feedback to government, advise on policy for social issues for which they have representational monopoly, engage in social action, and act as allies in creating, promoting, and symbolically representing a collective Québécois solidarity (Laforest, 2006). This is reflective of a Quebec tradition of civic action in which civil society organisations function as arms of the state and as means to challenge and correct social injustice through social action (Laforest, 2006). Thus, the province funds LGBT NGOs to implement its vision of a more socially equal Quebec after same-sex marriage legalisation.

Accordingly, same-sex marriage led to a major state expansion in funding opportunities for LGBT organisations, resulting in the growth of Montreal's LGBT sector. Given their role as partners in governance and the state's interest in LGBT organisations, LGBT groups expect to be funded by the province. The state's interest in funding LGBT organisations and NGOs' expectations for government funding continued despite the introduction of neoliberal New Public Management policy regimes under Premier Jean Charest's (2003-2012) and Premier Philippe Couillard's (2014-2018) Liberal provincial administrations—the effective slimming down of the Quebec state apparatus and welfare state. In fact, as I discuss in the next section, key policy frameworks which have codified LGBT social equality as a state goal and which been integral sources of funding for LGBT organisations were introduced and implemented in these Liberal administrations. Parallel to the Calgary case then, both the historical and contemporary provincial policy ecology, which is shaped by provincial and regional interactions with the federal centre through Québécois regionalism, has heavily impacted the environment in which LGBT organisations operate such that it circumscribes funding preferences for resource mobilisation. As I show later in this chapter, this expectation for state funding leads to significant resource dependence on the state—a dynamic in which the state holds all the cards, causing LGBT NGOs to do the bidding of sub-state nation-building as a condition of government funding.

Québécois regionalism may also play a role in how LGBT organisations understand and pursue their mission. This is reflected in the use (and non-use) of intersectionality in service provision and advocacy. Originating in critical race studies and particularly by feminists of colour, intersectionality refers to the idea that race, class, gender, sexuality,

and other social locations operate simultaneously in lived experience (Nash, 2008; Crenshaw, 1989; Collins, 1990). Highlighting the social, economic, and political marginalisation that can occur at the intersection of these social locations, it draws attention to the specificity of individual experiences, challenging the idea of a single identity or group status (Watkins-Hayes, 2014). Indeed, according to Collins (2017) intersectionality highlights the way in which knowledge is differently constituted at the site of different social locations, even changing as it passes through different social contexts. As Cho et al (2013) note, an intersectional approach seeks to make visible interlocking power dynamics and to illuminate how they are shaped by sameness and difference. Watkins-Hayes (2014) suggests that interlocking racial, gender, class, and sexual inequalities ultimately shape the way in which marginalised communities respond through social and political organising. In the context of LGBT NGOs in the context of this thesis, intersectionality can be thought of as a guiding theoretical framework used to understand diverse, multidimensional LGBT needs and how to respond to them through service provision, advocacy, issue representation, or other means.

The resolution of same-sex marriage created the space for a proliferation of identity-based groups to be recognised and issues to emerge within the LGBT community. As echoed elsewhere (Manning, 2017; Polikoff, 2019; Franke, 2019), issues facing youth, sexual and gender minorities within the LGBT community such as trans and non-binary people (those who do not identify exclusively as male or female), LGBT seniors, and people of colour have gained greater focus in the post-marriage context. Thus, the recent popular emergence of intersectionality to guide the activities and approaches of LGBT NGOs, especially in community development and EDI, both reflects and drives this renewed focus on marginalised ethnoracial, gender, and sexual identities within the LGBT community in the post-marriage era. In Toronto and Calgary, most organisations have adopted an intersectional approach to LGBT issues and services. In Montreal, the take-up of an intersectional approach was less universal, with many LGBT organisations—particularly those led by French-speaking NGO leaders—approaching issues of sexual orientation and gender identity seemingly in isolation.

The lack of intersectional approaches amongst Montreal LGBT organisations can be explained by the influence of Québécois regionalism on NGO discourses and behaviour. As intersectionality theory originated from within Anglophone academic and activist circles (Crenshaw, 1989), this presented a language barrier for largely French-speaking lesbian and gay activists. But as the leader of an EDI-focused NGO noted, even as this

theory was later disseminated in French, "Quebecers were resisting this because it felt like Anglophones telling them what to do" (Interview 43). This is potentially compounded by the seeming contradiction between the crux of intersectionality and Québécois identity: the emphasis on plural group and sub-group identities versus the cultivation and socialisation of one singular French-speaking national identity. Tellingly, amongst young Anglophone and bilingual NGO leaders, there is a strong push for intersectional approaches and those inclusive of two-spirited identities (the term in Canada for Indigenous sexual and gender identities possessing both masculine and feminine spirits).

Ultimately, the place of intersectionality in LGBT advocacy and service provision in Montreal illustrates the way in which nation—and Québécois regionalism—is mapped onto how NGO leaders conceptualise LGBT issues and identities. Coupled with the development of Montreal's LGBT NGO sector, it demonstrates how progressive policy shift interacts with societal structures to affect NGOs in the LGBT policy domain. More broadly, these findings around the role of sub-state nationalism in shaping the development, preferences, and behaviour of NGOs may speak to other subnational contexts. As Béland and Lecours (2005) echo, this "politics of territorial solidarity" is present additionally in the welfare state development of Flanders and Scotland (p. 676).

To be sure, there is a degree of closeness between Quebec's LGBT NGOs and the state owing to the tradition of Québécois regionalism. However, this relationship with the state does not necessarily mean that Quebec's LGBT organisations fit the definition of government-organized NGOs (GONGOs). An analytical category of NGOs, GONGOs look like voluntary associations but are financed largely by government sources and demonstrate varying degrees of government influence (Pifer, 1967). Created to respond to new, complex problems in society, GONGOs may be thought of as social arms of the state, providing specialised services and offering independent judgement (Hasmath et al., 2019; Skjelsbaek, 1971; Pifer, 1967). While these characteristics do broadly come into play in the Quebec case, GONGOs are organised by government and selection of their leaders is influenced by government (Hasmath et al., 2019). However, the strength of their ties to the state can vary over time (Hasmath et al., 2019). They are therefore ultimately dependent upon and answerable to government, and therefore do not possess the level of autonomy of traditional NGOs (Pifer, 1967). By contrast, Quebec's LGBT NGOs do not exhibit these characteristics of being government-organised or government-led: they are created by the LGBT community and are functionally autonomous from the state. While they expect government funding, which makes up a significant proportion of NGO revenues, they are

not precluded from drawing upon market and community (e.g., philanthropy) sources of funding, and indeed many do draw upon these sources to some degree.

Importantly, while Quebec's corporatist structure allows for some LGBT NGOs to possess representational monopoly on LGBT issues and advise the government (acting as a conveyor belt between state and society), LGBT organisations in this context do not possess the ability of GONGOs to apply pressure internally on government leadership. Their policy functions remain on the NGO side external to the state, where they apply pressure externally on government leadership through lobbying, use the media to raise awareness of issues, and mobilise public opinion (Hasmath et al., 2019). In other words, while they may have access to a direct route to the government's ear, this route is ultimately external to government rather than internal.

Moreover, GONGOs' closeness to the state can result in their statements, actions, and interpretations being viewed as partisan or non-objective at best, as they typically reflect government values and beliefs (Hasmath et al., 2019). Quebec's LGBT NGOs on the other hand retain the legitimacy of being LGBT community organisations. Dependency on government funding and their role as social partners of the state stems from Québécois regionalism. Yet, as I later illustrate, this overreliance on government funding may challenge the degree to which organisational activities in service provision and advocacy are free from government influence.

Identity Politics in Toronto

> "*It's the British hegemonic heterosexual reproductive legacy and the paramilitary reproductive system… This all plays out in government policy, media, and the courts… There is no [LGBT] movement, no community but a search for communities… What does citizenry mean? What does solidarity mean? …Who has been the most privileged?" (LGBT Community Development Program Leader, Interview 45, Toronto)*
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> *"There is an element of the polite Canadian environment that prevents needed conversations from happening regularly and therefore what happens when conversations do happen is that they become very combative. They default into being combative… In the language now, there is no intersection within intersectionality for people to meet and talk on common ground. The tool of shaming has been overused." (LGBT sector development expert, Toronto, Interview 67).*
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In contrast to the Calgary and Montreal cases, I found no historically and/or territorially-rooted sociocultural regionalism shaping the livelihoods of LGBT NGOs in Toronto. But one major sociocultural force at work is identity politics. Indeed, I found that that identity politics is a formidable force in Toronto's LGBT sector and to a degree not seen in the other cases, and perhaps even elsewhere in Canada.

A Brief Overview of Identity Politics

Identity politics broadly refers to a politics of individual and/or group difference. In this thesis, identity politics is discussed with respect to LGBT communities. LGBT identity politics has a long and complex history that, due to the focus of this thesis, cannot be fully unpacked here. To provide a brief overview, LGBT identity politics and organising in Canada emerged initially through the homophile organisations in the 1950s and early 1970s (Warner, 2002). Homophile organisations focused on fostering a collective identity based on same-sex desire, irrespective of race, class, gender, or other differences (Rupp et al., 2017). Gay liberation and lesbian feminism subsequently emerged in the 1970s in response to the Stonewall riot in New York, which marked the consolidation of everyday resistance with organised political activism against the backdrop of increasingly more radical social movements (Armstrong & Crage, 2006). Gay liberation and lesbian feminism saw activist groups emerge at local, regional, and national levels to represent different constituencies and interests, all working to end anti-LGBT discrimination in all sectors of society and to elect lesbian and gay officials to political office (McCaskell, 2016; Warner, 2002; Armstrong & Crage, 2006).

In response to the AIDS epidemic, which ravaged the gay community, the 1980s and 1990s saw the rise of AIDS activism, which emphasised direct action tactics that have become a recognisable feature of LGBT activism (Rupp et al., 2017). This period also saw the emergence of gay and lesbian groups from different ethnic communities (McCaskell, 2016; Ghaziani, 2008; Stein, 2012), partly as a community response to the specific challenges faced by ethnoracial communities in accessing HIV/AIDS care (I discuss this later in this chapter with respect to minority ethnospecific HIV service providers). As Watkins-Hayes (2014) observes, HIV/AIDS is an epidemic of intersectional inequality in which racial, gender, class, and sexual inequalities influenced political responses by the communities affected. Same-sex marriage activism and politics followed in the 1990s and early 2000s, dominating LGBT identity politics with a return to strategic collective identity through the narrative that same-sex couples 'just like everyone else' (Smith, 2008).

In the current post-marriage period, there is a renewed emphasis on difference. As previously noted, same-sex marriage legalisation created the space for more identity-based groups to be recognised and more issues to emerge within the LGBT community—and for many of these issues previously placed on the back burner to focus on marriage equality to return to the forefront (Bernstein, 2015). In the activist space previously occupied by marriage equality, issues focused on race and sexual and gender minorities within the LGBT community (e.g., trans and non-binary groups) have gained greater focus, and with it a resultant focus on gender, sexual, race, and class-based inequities (Manning, 2017; Polikoff, 2019; Franke, 2019). This very likely accounts for why intersectionality and identity politics have become a greater concern in the Canadian post-marriage LGBT policy domain in the context of this thesis (Bernstein, 2015).

With same-sex marriage settled, the provisional common goal uniting the community against a common foe had disappeared—"solidarity is more difficult" (Interview 46; Interviews 29, 30, 67). My participants noted that in the place of provisional unity is a new identity politics echoing 1990s feminist and anti-racist activism, which underscores the politics of race, sexuality, class, and nationality-based difference in lived experience (Mohanty, 1995; Interviews 46, 67). While this contemporary identity politics is not monolithic, there is a common political mobilisation of intersectionality discourse. Through individual and collective action, there is a commitment to dismantling systems of oppression and building alternative social structures with attention to power dynamics and axes of difference.

Social media platforms such as Twitter and Facebook arguably distinguish contemporary identity politics from previous iterations: while the discourse itself may be similar, the ease with which public criticism can be initiated anonymously and widely disseminated to 'hold organisations to account' is unmatched. Instances, language, and patterns of oppression are publicly named and shamed to police the boundaries of what is deemed normatively and thus 'morally' acceptable (Ahmad, 2015). Particularly damaging to NGO legitimacy, individuals and organisations become synonymous with the oppressive system (Ahmad, 2015). Organisational legitimacy refers to the capacity to be recognised internally and/or by beneficiaries, the sector, community, donors, and other external stakeholders as a rightful authority to represent issues of community interest, in addition to being a legally compliant and accountable organisation that does what it says it will do in its mission and possesses the competencies required to do so (Pearce, 1997; Lister, 2003;

Edwards, 1999; Edwards & Hulme, 1995). When referring to 'identity politics' in this thesis, I refer to this period of contemporary identity politics.

Of course, in this brief history of LGBT identity politics and organizing, there is overlap in the different periods. Moreover, it does not suggest that all LGBT groups necessarily went through an evolution in their activism and identity politics corresponding to the emergence of successive periods in the LGBT movement. It must also be noted that in referring to 'LGBT identity politics,' while there are clear periods of dominant focus of the LGBT movement writ-large, there are multiple LGBT identity politics at any one time owing to the different LGBT communities brought together under one umbrella. This is an important caveat, as discourse about identity politics ultimately shapes it, reconstructing it. Indeed, Watkins-Hayes (2008) illustrates the role of scholarly research in constructing identity politics, where the scholarly focus on certain recognisable elements of a social phenomenon shapes the conversation around it and hampers the ability of consumers of research (e.g., the public, policymakers, other academics) to grasp the fuller picture. As such, my reference to 'identity politics' in this thesis refers to contemporary LGBT identity politics writ-large but with this recognition that there is internal difference, diversity, and contention within it.

What is more, we cannot assume that these strands of LGBT identity politics based around groups of different racial, gender, class, and sexual difference were necessarily always collaborative. For instance, in the context of the modern women's movement, Roth (2004) argues that the movement consisted of different strands of both collaborative and confrontational feminisms. Indeed, history, race, everyday politics, and the geographic and structural location of communities within ethnic enclave neighbourhoods influenced the politics and tactics of different strands of feminism (Roth, 2004). Roth (2004) points to the challenges of organizing different groups of feminists with different histories into a single social movement, arguing that while there was a strategically shared political agenda, there was no harmonious movement.

Internal movement conflict and the presence of multiple strands of identity politics located at various axes of difference can be read into LGBT identity politics and activism. In fact, in the LGBT context, Armstrong (2002) notes that the gay identity movement, while tolerating of internal diversity and difference, was built around the interests of gay white men. Indicative of this, sexual liberation politics, for example, overshadowed the concerns of lesbians, who were more focused on parental rights especially in the context of

obtaining custody of their children from a previous heterosexual marriage (McCaskell, 2016).

Consequently, efforts to diversify the movement beyond racial and gender homogeneity have been difficult (Armstrong, 2002). This speaks to the emergence of separate ethnoracial LGBT groups at the height of confrontational LGBT identity politics during the AIDS epidemic. The diverse priorities and social locations of LGBT activists at all times also speak to the way in which LGBT identity politics has undergone changes in collective identities adopted by participants, strategically emphasising similarities across sexual identity at times and emphasising difference at other times (Rupp et al., 2017).

Participant Perspectives of Identity Politics

My participants frequently engaged with the topic of identity politics (i.e., contemporary identity politics), either directly by naming identity politics or indirectly by describing it. As noted earlier, my operationalisation of contemporary identity politics refers to: a politics of individual or group difference, in which there is a political mobilisation of intersectionality discourse and a commitment to dismantling systems of oppression and building alternative social structures with attention to power dynamics and axes of difference. In engaging with the topic of identity politics, my participants' accounts of what identity politics was broadly aligned with the above historical and conceptual account. However, participants held different views about what identity politics meant for LGBT organisations, what it was associated with, and its utility.

For some participants, identity politics is fundamental to understanding not only oneself as an LGBT individual, but the social, political, and economic world—and therefore it must be embedded within LGBT programs, services, and organisations. In Toronto, for instance, one participant illustrated this when describing his community development program focused on LGBT parenting:

> "I start my queer parenting classes with why these programs exist. I talk about the history of power and colonial expansion and Christianity… the notion of an English-speaking white male god with a white male cisgender heterosexual able-bodied son who owns all of humanity. It's the British hegemonic heterosexual reproductive legacy and the paramilitary reproductive system… This all plays out in government policy, media, and the courts… There is no [LGBT] movement, no community but a search for communities… What does citizenry mean? What does solidarity mean? …Who has been the most privileged?" (Interview 45).

For a youth-focused community development organisation in Toronto, identity is directly embedded within the NGO's hiring process, with its leader stating that recruiting board members and volunteers who are "racialised, trans, and who are not in university" is prioritised (Interview 48). In a similar vein, a member of an ethnoracial-focused EDI LGBT group in Calgary explained that the crux of the group's internal debate over whether or not to register as a nonprofit organisation was whether its members "want to be under this colonised system" (Interview 15).

In these examples, there is not simply an awareness of individual and group difference and how social locations operate simultaneously in lived experience; it is not simply about using this knowledge to understand multidimensional LGBT needs and how to respond to them, which would characterise an intersectional approach to LGBT NGO activities in this thesis. Rather, these examples demonstrate a clear mobilisation of this intersectional knowledge with a desire to dismantle existing power structures within knowledge, society, and within LGBT NGOs. There is, respectively, an intent to build alternative bodies of knowledge, build a more radical LGBT NGO staffed by the most underrepresented and marginalised groups in the LGBT community, and create a social organisation that does not conform to the dominant nonprofit model or regulatory system. In these examples, identity politics cannot be separated from the LGBT program, service, or organisation.

However, the above perspective was held by the minority. Overwhelmingly, participants perceived identity politics to hinder the goals of LGBT organisations. Some participants viewed contemporary identity politics as weakening LGBT unity and therefore weakening the political power of the LGBT community and by extension LGBT organisations. For instance, the former leader of an LGBT arts and culture NGO in Toronto noted that after the legalisation of same-sex marriage in Canada, "solidarity is more difficult," (Interview 46). The leader of an LGBT arts and culture NGO in Montreal similarly echoed:

> In the past, people would come together around issues of marriage, adoption, and employment. Back then, there was more political power because the LGBT vote was in the millions. Now, it's 'people of colour are here too,' 'women are here too,' 'trans people are here too.' The LGBT vote has split up. There is less political power." (Interview 30)

In other words, contemporary identity politics' dominant focus on intra- and inter-group difference is perceived by participants as a development which makes LGBT organising

more challenging. The emphasis on more groups and issues within the LGBT community is seen to have weakened rather than strengthened the political power of the community, its organisations, and thus LGBT civil society. LGBT civil society is perceived as potentially being less effectual in furthering the now more numerous social and political goals of the LGBT community.

Elsewhere, participants associated contemporary identity politics with surface-level politics as opposed to the 'real' substantive work that 'should' be the focus of LGBT organisations and activists. In Montreal, for instance, the leader of a queer women's EDI group stated that the current proliferation of identities and labels, in which each group is focused on furthering their own agendas, amounts to navel-gazing on the part of the community: it is "too specific. It's staring into your own belly button" (Interview 32). Similarly, in Toronto, the leader of an IRI NGO felt that identity politics "just shows off people's intellect but there is too much terminology. The main thing about being an LGBT activist is to support LGBT people" (Interview 59). He added that the 'alphabet soup' of expanding identity labels are "intellectual terms. In North America, there is a need to create unnecessary identities" (Interview 59). In other words, there is the sentiment that this post-marriage expansion of identity groups and associated issues is an exercise in surface-level identity politics—demonstrative of an identity politics in a context in which major LGBT rights have been secured and identity politics amounts to little more than an intellectual exercise among privileged groups. There is the sentiment that contemporary identity politics is a distraction to the 'real' action of LGBT advocacy and service provision that provide tangible benefit to LGBT people.

Indeed, participants frequently associated identity politics with intellectuals—specifically intellectuals on the far left of the political spectrum. A member of an LGBT sector development organisation described contemporary LGBT identity politics as being the domain of:

> "far left-leaning academics… They have no interest in moving forward collectively. Communities have every right to be angry with systemic oppression and to voice their anger, but assuming that that is all the work that needs to be done to create long-term change is a problem. The idea that the means is the end is a problem." (Interview 67).

Again, there is the perception that identity politics amounts to little more than an intellectual exercise. But here, it is not only perceived as a distraction to the 'real' action of

LGBT advocacy and service provision—it is seen as unproductive and even problematic in and of itself. It is counter to producing 'real' (i.e., substantive) change.

Or, in the case of a Calgary LGBT community development NGO, there is the sentiment that contemporary identity politics is in fact a detriment to LGBT organisations. In this example (which I discuss in Chapter 6 with respect to maladaptations), the organisation's former leader and staff sought to build a radical approach to LGBT service provision. It did this by expanding the range of issues and needs it would address and meet in the community—irrespective of whether they had the knowledge and capacity to do so. It also embedded an anti-oppression approach that foregrounded identity and difference in individual experience such that no two clients received the same type of care because all lived experiences are different. This was a major departure from standardised care practices at other community development NGOs, where all clients would receive the same services, be offered referrals, and a common standard of service provision practice would be observed.

As noted earlier, this approach went beyond simply recognising the intersections of difference in individual experience and using it to guide service provision to meet LGBT needs: this approach sought to remake LGBT service provision, remake the LGBT NGO, and dismantle power structures embedded within practices of standardised client care by mobilising intersectional knowledge. Identity politics was inseparable from the LGBT NGO and its activities. Indeed, this was the perspective expressed by the organisation's successor leader, who commented that "radical anti-oppression methods are about destroying the guts of good governance… The anti-oppression focus is about outing people. I've never seen it be used successfully anywhere" (Interview 1). That is, the focus of radical anti-oppression methods—in this case, synonymous with or a component of contemporary identity politics—is seen as squarely focused on individual and/or group identity and is counter to the systematic method and standardised practice required to run a community development NGO and effectively deliver service provision.

Thus, given the difference in participant viewpoints about contemporary identity politics and its utility, when I refer to identity politics, it refers broadly to a politics of individual and group difference, which captures diverse participant perspectives while acknowledging a complex history of organising in LGBT communities. It refers primarily to contemporary identity politics, occurring in the post-same-sex marriage legalisation period, in which there is a common political mobilisation of intersectionality discourse with the desire to dismantle dominant systems of power and oppression and build

alternative social structures. In the age of social media platforms (e.g., Twitter, Facebook), there is a new ease with which the discourse of identity politics can be engaged with by the mass public. There is also a new ease with which identity politics can be mass-mobilised through public critique and by holding individuals and organisations to account for actions that do not fall in line with identity politics discourses.

Contemporary Identity Politics in Toronto

Contemporary identity politics has particularly high resonance in Toronto's LGBT community due to the combination of linguistic, geographic, historical, and demographic factors. The lingua franca of much of queer identity political discourse means that it resonates for the most part with English Canada. Thus, it figures prominently in Toronto, the largest city in English Canada and home to the largest LGBT population in the country. Historically, Toronto has been the site of major developments in Canadian LGBT history, activism, and culture (McCaskell, 2016; Warner, 2002). These conditions make it possible for identity politics to take root in the sociocultural and political fabric of the city's LGBT sector and community.

Toronto's diversity also makes identity politics necessary for its proponents. According to the 2016 Census, Toronto has the second-highest percentage of foreign-born residents in the world, originating from 230 different nationalities and accounting for nearly half of Toronto's population (World Population Review, 2020; Flack, 2016; Statistics Canada, 2016). Yet, as seen elsewhere (McConnell et al., 2018; Balsam et al., 2011), Toronto's LGBT community has had an uneasy relationship with diversity, where non-white LGBT people are frequent targets of racism within LGBT spaces (Logie & Rwigema, 2014; Giwa & Greensmith, 2012). Preoccupied with issues of representation, power, and marginalised identities, identity politics therefore resonates strongly with members of Toronto's diverse LGBT community.

But the take-up of identity politics is generally split along generational and ethnoracial lines, with proponents frequently being younger and non-white. As such, it underpins what some LGBT NGOs do but not all. Yet, the sticking power of its critical discourse, compounded by social media platforms, makes Toronto's LGBT NGOs particularly careful about what they do, who does it, and how they do it. Thus, while identity politics is present across regional cases, I found that LGBT organisations in Toronto were likelier to modify their behaviour to avoid risks to organisational legitimacy. As I discuss further in Chapters 5 and 6, the volatile political climate makes the city's

LGBT NGOs particularly wary of making expansive claims over who they serve and the issues they address under the LGBT umbrella. Simultaneously, NGOs such as community development organisations are criticised by community activists for not being representational enough of intersectional diversity.

In another example, activist proponents of identity politics have accused the city's LGBT festival organisers of deliberate, malicious "attempts to erase Blackness" and of "anti-Blackness" for the underfunding of Black LGBT festival programming in Toronto (BLM-TO et al., 2018). As a result of the controversy, festival organisers have embarked upon a series of changes to organisational management, festival participation rules, and festival content. One prominent change saw the ban of uniformed police officers from participating in the festival parade due to their ongoing role in the oppression of LGBT people of colour (CBC News, 2019). Yet, longstanding and unresolved debate over whether and when uniformed police officers would be included in the parade has sowed conflict amongst all parties (DiManno, 2019; CBC News, 2019). In their attempt to satisfy all parties—including activists and their allies, the wider community, corporate and government donors, and members of the arts and culture organisation which organises the LGBT festival—the organisation satisfied no one. Repeated subsequent turnover in organisational management due to the volatile political climate affected resource mobilisation capacity, with the arts and culture NGO at one point facing financial fallout (Interview 61; CBC News, 2019).

The emergence of and heightened focus on intersectional identity groups in the LGBT community—the product of progressive policy change—has produced a contemporary politics of difference which makes social missteps costly for the NGO in the post-marriage context. In particular, satisfying multiple and conflicting lines of accountability has become costly for Toronto's LGBT festival organisers financially and legitimacy-wise. Echoing findings elsewhere, satisfying 'instrumental' accountabilities to those who demand and those who fund NGO services may have come at the expense of 'expressive' accountabilities to organisational mission and values, and vice versa (Ossewaarde et al., 2008; Knutsen & Brower, 2010). Illustrating the impact of progressive policy change on the LGBT policy domain in Toronto, same-sex marriage has given rise to a contemporary identity politics which seeks to upend the very political and economic systems that resource dependent LGBT NGOs depend upon for survival.

Individual Donor Behaviour in the LGBT Community

Shaped by regional societal forces (Bielefeld et al., 2005), individual giving behaviour directly impacts LGBT NGO revenue streams across cases. Reflective of western regional norms of community self-help, Albertans are the most generous donors in Canada, with a consistently growing donor base (Lasby & Barr, 2018). In 2014, the average annual donation (i.e., the averaged sum of individual donations claimed over the course of the year) in Alberta was approximately $2,500 (Lasby & Barr, 2018). Ontarians give regularly but donate less on average than Albertans, with an average annual donation in 2014 totalling approximately $1,800 (Lasby & Barr, 2018). Quebecers are the least likely to donate and give the smallest amounts in Canada (Lasby & Barr, 2018). In 2014, the average annual donation in Quebec was approximately $700 (Lasby & Barr, 2018).

While all LGBT organisations rely on individual donations, I find that Calgary and Toronto NGOs claim the largest share, with Calgary groups reliant on individual giving in lieu of substantial government funding. Montreal LGBT NGOs reported working as much as "six to ten times harder" to get the same donation amount as in English Canada (Interview 35). Thus, while regionalism facilitates giving behaviour in Calgary, it inhibits it in Montreal. French Catholic norms around humility persist, especially around money, affecting giving behaviour and the proclivity of LGBT NGOs to seek donations (Zubrzycki, 2016; Laforest, 2006; Interviews 35, 28).

Further illustrative of regional differences, Toronto and Calgary boast long histories of community giving. In both cities, LGBT community foundations foster philanthropy, or regular patterns of individual long-term giving, to fund the LGBT sector 'forever.' Philanthropic efforts are targeted to the LGBT community and its supporters (including wealthy benefactors), and seek to establish regular giving behaviour over time, whether in small amounts or large sums. In this thesis, I distinguish philanthropic efforts targeted at corporations as corporate sponsorship, which I discuss later in this chapter.

Crucial to NGO emergence, development, and meeting of immediate need, LGBT community foundations collect and grow individual donations, redistributing them as NGO grants. But unlike Toronto's community foundation, a staple since 1979, Calgary's organisation did not emerge until the early 2000s, the product of delayed LGBT sector development in a climate of homophobia. Norms of self-reliance may have also played a role, where existing arts and culture NGOs, such as drag groups, were already playing the sector's fundraiser role. Illustrative of weak giving behaviour (Laforest, 2006), Montreal lacks similar fundraising organisations. This has stunted NGO growth and sustainability, contributing to over-reliance on government funding.

Across cases, I find that LGBT NGOs are investing in philanthropy—a strategy complicated by changing demographics in the donor base. At issue is a shrinking, aging, primarily male donor base (especially white gay men; Interview 47), mirroring larger shifts in Canadian giving (Lasby & Barr, 2018). How this affects LGBT philanthropy differs by city, most evident in Toronto and Calgary where giving behaviour is strong. In both cities, aging donors present the possibility of being mentioned in bequests. In Toronto, donations have become smaller as disposable incomes shrink with retirement.

But the issue of aging is specifically a donor base aging in the security of same-sex marriage. For organisations across issue areas, this means that their donors no longer necessarily match their beneficiaries. Same-sex marriage legalisation may have been the end of the road for the sector's core donors, but it shifted organisational focus to the intersectional issues facing a new generation of beneficiaries. This problem is exemplified by a major HIV NGO, whose most marginalised populations with HIV no longer necessarily include gay men. Yet, gay men continue to be the primary donors due to the NGO's origins as a gay self-help organisation. For such organisations, the challenge has been convincing their donors that they should continue giving even if they have reaped the rewards of same-sex marriage. Effectively, the NGO's resource mobilisation is impacted by its organisational origins, echoing the importance in organisational scholarship of the conditions of emergence in structuring future organisational behaviour—that is, 'imprinting' (Tucker et al., 1990; Stinchcombe, 1965).

The situation differs in Calgary. For wealthy gay donors in the city's corporate workforce, long-term same-sex marriage legalisation coincided with retirement and the resultant ability to donate freely to LGBT causes without fear of being outed or threat of professional repercussions. Indeed, in a sector where financial success is dependent on personal relations, the potential professional consequences of coming out or being outed were real (Interview 8). In a "money-focused" city, this created a chilling effect on gay donors (Interview 8). This complicates assumptions in existing scholarship on the politics of sexuality in Alberta, which contends that the presence of corporate headquarters in Calgary means that tolerance for LGBT people should be greater because people living and working there are less sympathetic to morally conservative agendas (Rayside, 2008). While this may have been the case, the findings of this thesis show that fears of coming out and of showing support for LGBT organisations persisted regardless—and in fact precisely because they occurred in a corporate environment where the potential consequences were financial in nature.

Now 'out' and donating to make up for lost time, the challenge for Calgary's LGBT sector has been managing community perceptions of elitism as NGOs focus on attracting these wealthy donors. For instance, a board member of an LGBT community funder explained that they had received community backlash for their philanthropic strategy to "keep inviting the people with money to the [fundraiser] dinner—not because we like these people more but because it's the value of the $5,000 cheque versus the $50. This is the way it has to be… it's realistic" (Interview 2). But while pragmatic and strategic in that NGOs can collect donations more quickly by focusing on wealthy benefactors, there is a real risk of being perceived by community members as 'elitist'—that is, courting the wealthy and powerful for money while valuing its community base less because they have less money to give. In this sense, community members have deemed the NGO 'elitist' because the group appears to have aligned itself with the wealthy and powerful members of the LGBT community. To address and pre-empt any "blowback," the board member thus emphasised the importance of connecting with the community "to explain why we're doing this" (Interview 2).

These findings indicate the clear presence of regional forces at work in shaping the behaviour of LGBT donors (Bielefeld et al., 2005), thereby affecting the availability of resources, the cost of LGBT mission pursuit, and resource mobilisation strategies long after same-sex marriage legalisation. Societal forces in conjunction with progressive policy change therefore structure the context for NGO persistence. As I show, the interaction of societal, state, and market forces compound the problem of resource availability, resource mobilisation, and resource dependence to impact upon survival.

State Forces

This section explores the state forces shaping NGO sustainability long after progressive policy change. Through its role as funder, the state can enable and/or constrain the realm of possible NGO action. Indeed, the resource dependence of LGBT NGOs is such that it heavily shapes the extent of NGO-state relations and the policy ecologies which impact LGBT organisations. As I show, most LGBT NGOs across cases rely to some degree on government funding. But wider sociocultural, political, and economic structures shape the extent to which the state funds LGBT NGOs, the form this takes, and whether LGBT NGOs seek government funding. The opportunity structure for resource mobilisation and

thus survival is further complicated by issues of scale and bureaucratic inertia after progressive policy shift has been achieved.

LGBT NGO-State Relations

As I found, in the post-marriage context, the political and policy ecology which shapes the environment of LGBT NGOs—as highly resource-dependent organisations—is heavily determined by where their funding comes from. For the most part, LGBT NGOs reported primarily interacting with a particular level of government insofar as there was a funding relationship in place or there was the possibility (real or perceived) to obtain funding. Of course, as I discuss later in this section and in Chapter 5, many organisations in EDI, health, and IRI engage in policy advocacy activities to further their mission (and produce more favourable funding environments), creating another basis for state-NGO relationships. However, across organisations, issue areas, and cases, funding was the common denominator in NGO-state relations.

To fund services and promote civic values (Phillips et al., 2008), the province has generally been the largest source of government funding, followed by the city and then the federal government. In Canada's federal system, most social policy portfolios have been devolved to the provincial and territorial governments (Dunlop, 2009). These include health, education, social welfare, community and social services, accessibility, regional development, transportation, municipal affairs and housing, long-term care, labour, infrastructure, culture, energy, and environment and conservation. Thus, the province has jurisdiction and thus funding power (i.e., they decide which policy portfolios and issues get funding) for most if not virtually all of the issues that interviewed LGBT organisations addressed through advocacy or service provision across issue areas. As Phillips (2010) notes, these government-funded services provided by NGOs are a central part of what is publicly perceived to be 'public' services across Canada.

As the province has generally been the largest funder for LGBT organisations, my discussion of the state in this section and in this thesis focuses primarily on the provincial government. Due to this funding relationship, the provincial level is where participants reported the greatest degree of interaction with the state. As I illustrate in this section, these interactions occurred through processes such as resource mobilisation (i.e. obtaining funding), monitoring and evaluation processes associated with funding, and policy advocacy strategies with the goal of creating policy and funding environments in line with the NGO mission and which promote the capacity to pursue it.

By comparison, participants reported little interaction with the local government, with the exception of arts and culture organisations organising major LGBT events. As these events would require the city to shut down certain roads to take place, and were major tourism attractions, the organisers coordinated with the local government for permits and engaged with the city in a funding relationship. Funding-wise, however, these organizers still reported accepting the largest sums of money from the provincial government (Interviews 17, 29, 30, 46, 61). This illustrates a more resource-dependent relationship with the province and a relationship with the city focused more on event regulations and logistics.

Most participants also reported little interaction with the federal government. For the vast majority of organisations, any interaction with the federal government amounted to no more than filing annual income tax returns. This is the case even for the 46% of interviewed organisations who are registered charities (see Table 3.1), which are regulated by the federal government. At baseline, there is little if no money to be had from the federal government, as NGO funding would flow from provincial or local sources. As such, few organisations mentioned the federal government at all in their interviews and when asked about it, they reported little interaction with the federal government or that the federal level did not factor into their operational environment.

But there are some exceptions. For crisis-oriented IRI organisations, refugee repatriation activities are affected by domestic foreign policy decisions. As such, the federal policy ecology does matter in whether the foreign policy agendas of the administration in power facilitate or impede the activities of these IRI NGOs. According to the leader of one such NGO, the federal Conservative administration under Prime Minister Stephen Harper, while outwardly less embracing of LGBT issues, quietly facilitated the relocation of scores of LGBT refugees from undisclosed "hot spots" (Interview 59). The current Liberal administration of Prime Minister Justin Trudeau, which pursues an outwardly pro-LGBT policy agenda, has also facilitated the relocation of LGBT refugees, specifically from Chechnya. One NGO leader reported working behind the scenes with federal staff to quietly relocate LGBT refugees (Interview 59). But these crisis-oriented IRI NGOs represent only a fraction of IRI-focused organisations and an even smaller fraction of all interviewed LGBT organisations. I discuss this in further detail in Chapter 5.

In some instances, the federal policy ecology comes into play when federal administrative agendas directly impact the real or perceived capacity of LGBT NGOs to pursue their missions. This can occur when the policy agenda is not directly related to

LGBT issues. One instance that participants mentioned was the 2012 federal audit of charities under the Harper administration. Politically-motivated, a select number of charities were audited to determine if their advocacy activities exceeded the now-revoked limit on political activities for registered charities (Beeby, 2014). Charities under audit faced a significant reduction in capacity as staff were preoccupied with simply producing the paperwork (and translations when necessary) for the audit (Beeby, 2014). Among LGBT organisations, this audit ultimately affected only one HIV NGO across all three city cases. However, according to a former member of this NGO, the audit created a chilling effect for other LGBT charities engaging in advocacy activities (Interview 59).

Conversely, the federal policy ecology may come into play when the administrative policy agenda directly addresses LGBT issues. This includes the same-sex marriage debates in the early 2000s (which occurred both federally and provincially) and debates over gender identity protections (from discrimination, hate propaganda, and hate crimes) in the mid-2010s, both of which resulted in landmark LGBT rights and protections. National and provincial level LGBT advocacy organisations became directly involved in these debates. Another example is the Trudeau administration's establishment of the LGBTQ2 Special Advisor and Secretariat, which I later discuss in this section. The establishment of this post signalled the administration's pro-LGBT stance, creating new opportunities to interact with the federal government specifically on LGBT issues. For instance, some LGBT NGO leaders reported meeting directly with the LGBTQ2 Special Advisor to discuss the possibility of additional funding for LGBT NGOs (Interviews 28, 29, 30, 70). As I later illustrate, however, the establishment of this post and governmental unit created what some LGBT NGO leaders perceived as false hopes for more funding. Indeed, other than affecting the perception of the federal government for a small number of NGOs, the Trudeau administration's symbolic pro-LGBT gestures did not have much impact on the operational environment of LGBT NGOs.

Additionally, for EDI-focused advocacy organisations, the jurisdictional scale of their activities might but not always mean that they interact with the federal policy ecology. This is the case even for many national-level organisations. As I discuss in this section and in Chapter 6, the scale of NGO operations across LGBT organisations is generally locally focused for mission-based, pragmatic, and strategic reasons. Thus, for reasons of limited capacity and geographic scale which complicate nationwide representation (which I later discuss), even national-level organisations reported only some interaction with the federal government in the post-marriage context. This interaction

tended to occur on an ad hoc basis and for specific issues that pertain to the federal level such as nationwide same-sex marriage laws, gender identity protections in key human rights legislation, and LGBT issues in foreign policy agendas.

Outside of these ad hoc interactions, and in a context in which major LGBT rights protections have already been obtained federally, national-level EDI-focused advocacy organisations tended to focus on provincial-level or even local-level issues. For instance, one major national-level EDI organisation shifted its focus from same-sex marriage to education—essentially legal equality to lived equality. As the policies and programs shaping lived equality fall under social policy such as health, education, social welfare, and community and social services, this transformation in focus also signalled a shift in practice from a national to provincial/local scale. This post-marriage focus on lived equality is generally seen across interviewed national-level organisations, which tended to be EDI-focused. As a result of this lived equality focus, advocacy organisations reported engaging in service provision or community development either in addition to advocacy activities or in place of them (Interviews 14, 64, 69, 55, 56, 57). In addition to policy advocacy activities provincially, one NGO offers drop-in programs for LGBT youth and coordinates housing support for homeless LGBT youth. Another national level NGO has abandoned much of their policy advocacy and instead organises social events, inclusive spaces, and peer supports for LGBT Muslim Canadians. A third national level NGO does not engage in advocacy at all, instead conducting inclusivity workshops in schools across Canada. These activities and shifts in issue area further distance these national-level organisations from the federal level, promoting greater engagement with local and provincial levels.

As Smith (2008) further notes, the combination of a small population, huge land mass, limited capacity, and limited funding available (from public and private sources) precludes national LGBT advocacy organisations in Canada from being truly pan-national in scope. Thus, as I found in my interviews, not only did national-level advocacy organisations operate more locally and provincially in practice, but they tended to be rooted in the province in which the organisation was located with either limited or non-existent presence in other provinces in Canada (i.e. no physical office in other provinces and little or no EDI work pertaining to other provinces). A Montreal EDI NGO leader even pointed out that Canada's largest national-level EDI-focused LGBT group is largely unknown in Quebec because they have little presence in it. As such, coupled with the post-marriage shift in the EDI issue area from legal to lived equality, these factors challenge

what it means to be a national-level organisation and complicate presumptions that national-level NGOs would necessarily have much engagement with the federal level.

Thus, the federal policy ecology does matter in the lives of LGBT NGOs but, as these examples show, the extent to which it comes into play through NGO-state interactions is limited. Only a small number of organisations reported interacting with the federal government throughout the post-marriage context, and this tended to be vis-à-vis crisis-oriented IRI activities, instances of regulatory impact, pinnacle LGBT rights, and symbolic policy gestures. With the exception of crisis-oriented IRI organisations, which may coordinate behind the scenes with federal staff, these interactions tended to be ad hoc rather than consistent. Even for national-level EDI-focused advocacy organisations, geography, capacity, finances, and the shift from legal equality to lived equality has shifted the jurisdictional scale of their activities to be more provincially and locally focused.

Outside of these exceptions, I found the provincial policy ecology to be the most dominant in impacting the operational environment for LGBT NGOs due to the funding relationship between LGBT NGOs and the province. This is why for LGBT NGOs across cases, the state was most pronounced in its role as funder. From the funding perspective of this thesis, provincial political and policy dynamics were identified as being the most pertinent to NGO operations, compared to local and federal policy ecologies.

This is not to say that these ecologies exist in isolation. I found that while there is interaction between provincial and federal policy ecologies to impact the environment in which LGBT NGOs operate, this was limited to the way in which the province's relationship with the federal centre has produced distinct regionalisms. As noted earlier in the case of western regionalism and Québécois regionalism, these regionalisms were found to shape provincial politics, provincial funding for NGOs (and the role of NGOs in the state apparatus), and behaviour and funding preferences of LGBT NGOs themselves. In other words, the provincial policy ecology is the most dominant in impacting the environment for LGBT NGOs, but it is ultimately shaped by provincial and regional interactions with the federal centre through regionalism. Coupled with my analytical focus on financial resources vis-à-vis NGO survival, this provides the basis for my focus on the provincial government and provincial policy ecologies in this thesis. Thus, my discussion of the state in this section and in this thesis focuses primarily on the provincial government.

The State as Funder

Regardless of issue area, most organisations relied to some degree on government funding. Grants from centralised nonprofit programs may be supplemented by small grants from individual government units. While long-established community development and health organisations continue to receive recurring mission-based funding, government funding has largely shifted from mission-based (i.e. core funding) to project funding. This speaks to the evolution of Canadian third sector funding and mirrors broader NGO funding trends in development, where funding short-term projects is favoured for producing quicker 'tangible' outcomes as evidence of value for money and policy effectiveness (Phillips et al., 2008; Lewis, 2014; Ishkanian, 2014).

Each province's centralised project grant program has similar restrictions: in Alberta's Community Initiatives Program, the Ontario Trillium Foundation, and Quebec's *Bureau de lutte contre l'homophobie et la transphobie*, projects must be new and last up to a year in length—while they can be scaled-up or replicated, they cannot be resubmitted as is for continuous funding. Significantly, this impedes project/service continuity. It is also time-consuming, resulting in NGOs having to "reinvent the wheel all the time" (Interview 20). This is coupled with extensive application, monitoring, and evaluation processes, reflecting a dominant preoccupation with accountability in Canadian government funding to the third sector (Phillips et al., 2008). Given these challenges, pursuing and using government funding becomes capacity-draining, deterring new and small organisations from government grants.

The take-up of government funding given these restrictions illustrates a regional political economy of NGO funding. I illustrate this in Table 3.3 in Chapter 3 with a breakdown of NGO funding across cases. Only 50% of interviewed organisations in Calgary received government funding, and it tended to comprise a fraction of NGO revenue. Similarly, in Toronto, less than two-thirds of interviewed NGOs received government funding and, apart from HIV organisations, it comprised just a portion of diverse revenue streams. New organisations, especially in Calgary and Toronto, were the likeliest to eschew government funding in favour of alternative sources. This can be explained by societal norms of individual giving in both cities which enable an alternative revenue stream, reducing reliance on government funding. In both cases, LGBT philanthropy was made possible and necessary by regional giving behaviour and the legacy of 1990s-2000s New Public Management reforms which gutted provincial social spending and NGO funding (Sonpal-Valias et al., 2016; Chouinard & Crooks, 2008). Coupled with an unpredictable oil and gas-based economy, a state uninterested in LGBT NGOs, and

western regional norms of self-reliance, Calgary NGOs are more prone to diversifying funding streams than elsewhere in Canada (Sonpal-Valias et al., 2016).

In Montreal, however, a whopping 85% of interviewed organisations received government funding, comprising an extensive proportion of NGO revenue. This can be explained by strong state willingness and capacity to fund LGBT NGOs, tied to the role of NGOs in society and governance in Québécois regionalism. In 2008, following consultation with LGBT NGOs, the Government of Quebec launched the *Government Action Plan against Homophobia and Transphobia* (henceforth the *Action Plan*). In its second five-year iteration at the time of fieldwork, the *Action Plan* is a mandate for achieving long-term LGBT equality, requiring provincial ministries to challenge homophobia and transphobia in state and society. In practice, however, the *Action Plan* often takes the form of "sub-contracting" LGBT NGOs to provide services or create public awareness campaigns (Interview 24). Importantly, the *Action Plan* established the *Bureau de lutte contre l'homophobie et la transphobie* (henceforth the *BLCHT*), a unit in the Ministry of Justice to fund these endeavours.[3] Most LGBT NGOs in Montreal receive funding via this channel.

But the dependence of Montreal's LGBT sector on *Action Plan* funding illustrates the influence of grant restrictions and political agendas on NGO livelihoods. According to the leader of a prominent EDI-focused NGO, "there is a desire from the government to satisfy everybody" whereby *BLCHT* funding ends up supporting "small organisations that by the law of nature would not exist otherwise… I think it is the government's way of controlling the number of organisations" (Interview 19). As I find, *BLCHT* funding tends to be distributed to as many organisations as possible, encouraging new NGO formation with the aim of funding a multitude of short-lived projects. Consequently, Montreal's LGBT sector has ballooned in size while keeping most organisations small, underfunded, and unsustainable.

Contradicting state goals for achieving substantive LGBT social equality, the *BLCHT* funding distribution reflects a political agenda: as I contend, it makes LGBT social equality measurable, 'accountable,' and thus legible to the state through short-term projects. In turn, these short-term projects enable the state to demonstrate in measurable terms its commitment to LGBT social equality. The case of the *BLCHT* shows that

[3] While the *BLCHT* is a social arm of the government created and financed by government and answerable to it, it is not considered a GONGO because it is ultimately a part of the government itself rather than a somewhat autonomous but government-influenced entity.

neoliberalism (as actualised through the emphasis on producing measurable, accountable, and tangible outcomes) is a vital tool by which the state can fund an otherwise vague project of LGBT social equality and configure it into a mechanism to support its nation-building imperatives. But ultimately, the neoliberal forces underpinning short-term project-based funding are counter to the goal of achieving substantive LGBT social equality, evidenced by the impact of *BLCHT* funding on project and organisational sustainability. This speaks to the complex role of neoliberalism in state-led social agendas and in sub-state nation-building, as scholars have found elsewhere in domains of transportation policy, energy policy, and in subnational territorial contexts (Grengs, 2010; McAffee & Shapiro, 2010; Béland & Lecours, 2005).

Nation-building imperatives figure elsewhere in *Action Plan* funding restrictions. Embedded in the political ideology of the Quebec state, *Action Plan* funding moreover restricts what service providers and advocacy organisations can do. The *Action Plan* focuses solely on fighting homophobia and transphobia 'out there' in society, equating their resolution with LGBT social equality (Interview 35). Fighting homophobia and transphobia exclusively, in seeming isolation from other intersecting issues, and avoiding the promotion of LGBT culture and community, enables an 'achievable' vision of LGBT social equality. I suggest that it contributes to an ideation of LGBT identities compatible with a singular collective Québécois national identity. This focus steers service providers towards anti-discrimination activities, moreover guiding what advocacy NGOs identify to the state, other NGOs, and the LGBT community as pressing policy issues: "heteronormativity and oppression—not inclusion" (Interview 35).

Further, the dependence of advocacy organisations on government funding calls into question their political independence. For a prominent LGBT advocacy group, even the process of accounting for spending in their annual report requires describing how they are "criticising the government and are encouraging members to act politically against the government" (Interview 23). This may curtail particularly contentious actions, but also provide evidence of the organisation's anti-government activity. This evidence can be used to undermine the NGO's legitimacy or to reduce or rescind future funding, especially by administrations unsympathetic to the NGO's cause.

Yet, for advocacy groups and service providers, weak giving behaviour necessitates relying on government funding to survive despite restrictions straining capacity and curtailing the bounds and continuity of activities. Overreliance on government funding, embedded in regional forces, thus acts as a check on the capacity and thereby power of

Montreal's LGBT sector and LGBT civil society more broadly. This complicates NGO reliance on a single stream of revenue, one heavily shaped by the legacy of progressive policy shift and the political agenda of sub-state nation-building. But it further challenges the purported benefits of a state eager to fund LGBT NGOs in the post-marriage context.

Issues of Geographic and Political Scale

The enormous geographic scale of Canada's provinces and territories offers an opportunity for continued work by LGBT NGOs, enabling the state to reach people beyond urban areas and organisations to move the goalpost for long-term persistence. Across cases, this has provided the opportunity for more government funding for EDI, community development, and health by scaling up or replicating existing projects in other regions. Accordingly, many long-established LGBT NGOs tend to serve regions beyond their municipality.

But as I find, this strategy may carry funding limitations, and costs to capacity and legitimacy. NGOs operating at a provincial or national scale face geographic constraints around funding eligibility. Provincial- and national-level organisations, which tend to be EDI- and community development-focused, are eligible for government funding at their respective jurisdictional levels. However, this entails a province-wide and nation-wide competition for funding. Eligibility for municipal funding requires having a physical office located in the municipality. This is challenging for even the largest LGBT NGO in the country, which continues to operate a single office. Scalar funding constraints disproportionately affect Toronto's LGBT sector, home to a large proportion of provincial-level and national-level organisations. Consequently, provincial-level and national-level EDI and community development NGOs tend to be localised in their activity in one municipality, with weaker presence outside of it—a reality which calls into question their ability to be truly representative of the jurisdictional scale of their mission.

Policy devolution across political scale also offers opportunities for additional funding. But there are time, accountability, and legitimacy costs to navigating the maze of municipal, provincial, and federal funding sources. NGO leaders across cases frequently expressed wanting government funding but being unaware of available opportunities or being deterred from applying because the application process is too resource intensive. Emerging, small, and/or mainstream NGOs just getting into the LGBT policy domain face serious obstacles in navigating government funding opportunities. Older organisations are at a significant advantage, possessing the in-depth knowledge of and connections within the state funding landscape to find and apply for these funding sources. They also have the

capacity, legitimacy, and evidence of effectiveness to demonstrate the ability to utilise the funds to deliver the most value for money. Illustrative of this, leaders of long-established provincial- and national-level LGBT NGOs in Montreal described being able to arrange multi-year funding partnerships with provincial and municipal officials, bypassing centralised grant application processes. With solid reputations, these organisations would already be on the radar of ministries under pressure to partner with an NGO to fulfil their *Action Plan* quota for the year.

Yet, when government funding strategies are successful, NGOs may face additional challenges around accountability to multiple political levels. Accountability to funders is dependent on ensuring the use of resources fulfil funder priorities. Differentiation of priorities between political levels may produce conflicting behaviour in messaging or service provision as organisations attempt to satisfy multiple lines of accountability (Ossewaarde et al., 2008). Illustrative of this tension, one provincial-level community development NGO described the struggle to sufficiently balance the provincial scale tied to their provincial funding and the Toronto scale tied to their municipal funding. To continue receiving both funding streams, they cannot afford to appear too Ontario-focused nor too Toronto-focused. But to satisfy provincial funders, they must do a sufficient amount of work across the province—which geographic scale makes financially prohibitive. Demonstrative of the financial barriers of geographic scale, one Montreal NGO leader commented that even the distance between regions of Quebec is enormous: driving from one end to the other of the Gaspésie region, a peninsula the size of Belgium at the south-eastern tip of Quebec, takes four hours at a cost of $5,000 to deliver a single workshop.

Political scale may also create unmet expectations for funding, as I found with LGBT organisations and the federal level. In 2016, the Trudeau administration appointed the country's first LGBTQ2 (lesbian, gay, bisexual, transgender, queer, two-spirited) Special Advisor to the Prime Minister and established the LGBTQ2 Secretariat within the Privy Council Office (PMO, 2016). The move signalled federal interest in working with LGBT NGOs to foster LGBT equality in Canada (PMO, 2016). But apart from putting forward symbolic legislation addressing historical state-led anti-LGBT discrimination, the Special Advisor and Secretariat roles operate behind the scenes, influencing departmental policy in each federal unit to be inclusive of LGBT issues and populations (Boissonnault & McDonald, 2018).

While the Special Advisor role is a partisan one, the Secretariat is a policy unit (rather than a department) which provides non-partisan advice on LGBT issues to the

Prime Minister's Office and the Cabinet (Boissonnault & McDonald, 2018). The LGBTQ2 Secretariat works with federal departments and across the federal public service to ensure that LGBT issues and inclusivity are integrated within institutional practice. A somewhat autonomous social arm of the government created and financed by government and answerable to it, the Secretariat might be considered a GONGO. GONGOs may apply pressure internally on political leadership and act as an internal monitoring agency—in the case of the Secretariat, on the government and federal public service's LGBT inclusivity within policy and institutional practice (Hasmath et al., 2019). Unlike NGOs, GONGOs are not fully autonomous from government. Thus, while the LGBTQ2 Secretariat role is intendedly non-partisan and therefore theoretically possesses some distance from government, its establishment and purpose ultimately reflect the values and beliefs of the Trudeau administration. This is underscored by its initial location[4] within the Privy Council Office, which supports the Prime Minister and the Cabinet, further highlighting its operational closeness to government and lack of full autonomy from the government.

As it is a policy unit rather than a federal department, the LGBTQ2 Secretariat does not supply funding to NGOs. Nevertheless, the establishment of a federal policy unit for LGBT issues has created unmet expectations for NGO funding, solidifying existing federal disenchantment in regions far from the political centre, especially in Montreal. While initially welcomed, dissatisfaction with the Special Advisor and Secretariat dominated a year later. One leader of a national-level organisation commented that the Special Advisor is "happy to pop up with his slideshow with rainbows but he has made no concrete follow-through except for the apology and the flawed legislation" on compensation for LGBT civil servants historically expelled from the government (Interview 70). Referring to Trudeau's celebrity status as a socially progressive politician, the leaders of a local Montreal organisation similarly expressed that "it is easy to surf the superstar wave but we need real commitment" (Interviews 29, 30). Having met with the Special Advisor, they added that "there has been no commitment from him" (Interviews 29, 30). The economic nature of 'commitment' was summed up by another Montreal NGO leader: LGBT issues are not a priority because LGBT organisations are not benefiting financially. It has been "words and no action" thus far (Interview 28). The visibility and tangibility of money is thus perceived as the most overt indicator of concrete state commitment to LGBT equality and NGOs: money is genuine, and anything short of it empty platitudes.

[4] The LGBTQ2 Secretariat has since moved to the Department of Canadian Heritage.

Displays of 'concrete commitment,' however, are impeded by the very institutional change that LGBT NGOs seek. The state's move away from dedicated LGBT-specific funding, which implies a special interest group status, is ultimately what LGBT NGOs want. This type of fundamental policy change enshrining LGBT equality within governance structures is what LGBT NGOs have been seeking for decades. Calls for 'concrete commitment,' however, suggest a tension between the type of long-term institutional goals that NGOs pursue and the immediate tangible funds they seek which are contingent upon the administration in power. This suggests a political economy of progressive policy change: the desire for tangible LGBT-dedicated funding—the litmus test of genuine state commitment—impedes attainment of what LGBT organisations want long-term vis-à-vis the inclusion of LGBT people in policy and society. Thus, insofar as progressive policy change means less visible, more normalised state support, LGBT NGOs may be less satisfied with the state the more they get what they want. This presents a clear unintended outcome to the puzzle of what happens when organisations get what they want. It also echoes NGO findings elsewhere which show that the need for resource mobilisation to survive as an organisation may interfere with achieving ultimate social goals (Ossewaarde et al., 2008; Jones, 2007).

Bureaucratic Inertia and the Buffering Effect of State and State-Sponsored Forces

Bureaucratic inertia in this thesis refers to the capacity for the state apparatus to resist change and maintain the status quo as a result of institutionalised patterns of activities (Hur et al., 2019). My use of bureaucratic inertia here pertains specifically to government organisations and government sponsored organisations. 'Government organisations' in this thesis refers to organisational units within the state apparatus such as departments/ministries, departmental/ministerial units, and agencies. 'Government sponsored organisations' refers to organisations with varying degrees of state influence and closeness to the state—i.e. GONGOs.

Bureaucratically inert institutions retain institutional practices no longer suited to current conditions. As such, they are generally seen as non-beneficial and even regressive, impeding policy implementation (Hur et al., 2019; Carey, 2007). But as I find, they can also be counterintuitively beneficial in the organisational context, buffering or insulating NGOs from environmental selection (Miner et al., 1990). This paradoxical dynamic is evident across all cases, shaping the conditions for NGO persistence and thereby LGBT advocacy and service provision. In Chapter 6, I discuss the parallel case of organisational

inertia in NGOs, where I similarly show the potential benefits of inertia to survival. Together, these findings challenge the dominant scholarly interpretation of inertia in organisations as necessarily harmful and counterproductive to organisations and social policy (Hur et al., 2019; Carey, 2007; Geiger & Antonacopoulou, 2009; Huang et al., 2013).

Given limited and restrictive government funding options in Alberta, a government sponsored funding source comprises a large chunk of most NGO budgets: casino revenue. Legally required to partner with registered charities, Alberta's casino revenue is pooled and divided amongst participating NGOs at the end of each quarter. This process is overseen and made possible by the AGLC (Alberta Gaming, Liquor, and Cannabis), an arms' length provincial agency—in other words, a GONGO. Bucking development trends favouring short-term project-based funding, casino revenue might be considered akin to recurring mission-based funding. Casino revenue is the largest source of income for Calgary's LGBT charities, comprising as much as nearly half of NGO revenue. As charities make up 60% of the city's LGBT sector, the profits of 'social vice' are therefore the lifeblood of Calgary's LGBT organisations.

The AGLC has strong bureaucratic characteristics and organisational culture similar to those of government. This is reflective of a GONGO due to close proximity between GONGOs and government (Hasmath & Hsu, 2014, 2016). But bureaucratic practices significantly impact relations with and operations of NGOs. Indeed, outdated practices at the AGLC make receipt of its vital funds costly. Frequently evolving regulations at the highly bureaucratic AGLC are compounded by reliance on antiquated technology. Said one exasperated arts and culture NGO leader:

> "They can't even open email attachments! They don't know what Dropbox is. We have to print a fucking *book* and ship it to them! They ask us to fax something to them and we can't because no one has fax machines anymore. So we have to print it and mail it to them." (Interview 5).

In some cases, the time and resources required to navigate AGLC regulations and complete monitoring and evaluation forms warrants hiring a dedicated staff member, presenting additional costs (Interview 5). But as a GONGO, the AGLC ultimately acts as an environmental buffer (Miner et al., 1990). Short-term project restrictions are a feature of government funding across cases, but their impact on the LGBT sector was pronounced only in Toronto and Montreal, resulting in a pattern of novel but short-lived projects. This was not the case in Calgary. Casino profits minimised NGO reliance on short-term

government grants, enabling long-term continuity of program provision. The AGLC, which makes casino revenue possible, therefore buffered Calgary's LGBT sector from the knock-on effects of short-term government funding.

In Montreal and Toronto, the benefits of bureaucratically inert institutions are similarly dependent upon lack of government reform. In Montreal, recurring mission-based funding through the Ministry of Labour, Employment, and Social Solidarity and the Ministry of Health and Social Services is set up such that NGOs are funded for life. The criteria to get onto 'the list' to receive this funding? Moving up from the waiting list in the rare instance that an NGO no longer requires the funding or has committed fraud (Interviews 24, 21). Thus, only ten LGBT NGOs across the province are on 'the list,' including a handful of Montreal's long-established LGBT organisations—the rest remain on the waiting list. Montreal's NGO leaders complain that "there is a lot of fat" in this funding system (Interview 24). Exemplifying bureaucratic inertia, there is little oversight to ensure organisations on 'the list' are doing more than producing an annual report, resulting in a bloated number of NGOs funded for life regardless of merit. But while there is a desire to "clean up the list, cut the fat," the bureaucratic inertia that enables the largely unregulated, lifetime nature of this funding opportunity—and resists reform—acts as a buffer for LGBT NGOs already on 'the list' (Interview 24). Guaranteeing a baseline of survival, bureaucratic inertia shields these organisations from the whims of changing administrations and the time- and content-based restrictions of *Action Plan* funding. With little oversight, these organisations are free to do as they please.

Moreover, the size and complexity of the Quebec state apparatus shapes NGO strategies to obtain funding. Bureaucratic inertia opens the door for NGOs to cut through the red tape such that the main criteria for funding is persistent lobbying to individual ministers. Writing directly to Quebec's Members of Legislative Assembly (elected provincial representatives) for ad hoc funds is common. Notably, after one meeting, the leader of a prominent NGO called the Montreal Mayor's office every day for six months until he secured a $375,000 partnership with the city, a massive sum enabling the NGO to extend its outreach services full-time. The ubiquity of bypassing official routes of government funding amongst Montreal groups is such that going around the system is viewed as legitimate rather than queue-jumping.

In Toronto, bureaucratic inertia in provincial HIV policy in conjunction with the state's need to 'save political face' enabled the long-term continuity of minority ethnospecific HIV/AIDS service organisations (ASOs). Organisations which serve

ethnoracial populations with low incidences of HIV, minority ethnospecific ASOs were established in the late 1980s and early 1990s to address HIV in small ethnoracial communities where language and cultural differences created barriers for mainstream ASOs. Like their mainstream counterparts, minority ethnospecific ASOs engage in HIV prevention activities and offer support for those living with HIV, including support for accessing basic necessities, government services, and treatment (see Chapter 5). However, these services are tailored to the specific cultural and linguistic context of their demographic. With service demand and HIV incidences too low to justify a continued HIV focus, these organisations have evaded mergers or closures, continuing to be provincially funded.

In fact, their long-term persistence can be attributed in part to the province's long-outdated approach to HIV prevention, treatment, and support. While anachronistic, this policy approach and the slow pace of bureaucratic change prolonged the lives of minority ethnospecific ASOs beyond their epidemic-era instrumental utility. Coupled with this is the state's concern to maintain 'political face.' The leader of a minority ethnospecific ASO candidly stated that minority ethnospecific ASOs "coasted on HIV funding," adding that "the funding was available and everyone knew that the province can't de-fund these ASOs because 'that's racist'" (Interview 53). Thus, policymaker fears of being perceived as racist may have additionally played a role in resisting HIV policy reform which would have negatively affected the funding of minority ethnospecific ASOs. This highlights the role of politics and public perception in HIV NGO survival, adding to similar findings by Chambré and Fatt (2002) in the US context. Further, as there was no data to prove the exact HIV prevalence amongst minority ethnoracial groups in Ontario (PHAC, 2014; Haddad et al., 2018), there was no data that the government could use to prove that these ASOs did *not* merit funding based on HIV incidence numbers. As I suggest elsewhere (Ng, 2018), together these factors facilitated the long-term persistence of minority ethnospecific ASOs.

However, federal and provincial governments have restructured HIV funding priorities, signalling a potential end to state's buffering effect. With government funds declining, LGBT donors are becoming more important, adding to an already fierce competition amongst LGBT NGOs for a common donor base. With a common donor base at stake, HIV organisations will compete more directly with LGBT NGOs for the same pool of individual donations. Competitive lines have been redrawn long after the end of the

HIV/AIDS crisis, demonstrating the impact of progressive policy shift on HIV organisations and, in turn, LGBT organisations within a common policy domain.

Challenging and expanding existing notions of bureaucratic inertia, these examples across issue areas and regional cases shows that inertia in government organisations and government sponsored organisations (see also Phillips et al., 2008) may in certain cases be beneficial to organisational survival. In facilitating resource mobilisation, bureaucratically inert state institutions and state sponsored institutions such as GONGOs are shown to be crucial rather than an impediment to the advocacy and service provision activities of LGBT EDI, community development, and HIV organisations. However, the benefits of bureaucratic inertia are contingent upon lack of government reform and in Calgary's case the persistence of gambling in society. The case of Calgary is an ethical paradox in which social vice is an engine of doing social good, raising questions about the resource implications for the city's NGOs more broadly if social efforts to reduce gambling were effective.

On the whole, the LGBT case reflects broader patterns in provincial and federal government funding of the third sector in Canada, which de-emphasises sustainable state funding in favour of individual donations to supplement short-term grants (Phillips, 2010). The roadblocks to obtaining sustainable government funding are rooted in the state's view of NGOs in Canada through the lens of a 'charity' model, whereby NGOs are viewed chiefly as providers of services to disadvantaged populations and should be supported in large part by philanthropy (Phillips, 2010; Elson, 2014). Though, as I have shown, regional differentiation exists, with Quebec NGOs viewed simultaneously as partners in social governance and thus expected to be funded largely by the state (Laforest, 2006).

Indeed, the LGBT case adds to existing research on the Canadian third sector. While the dominant scholarly assumption is that most small and medium-sized Canadian NGOs have little interest in engaging in social policy with the exception of environmental NGOs (Phillips, 2010), LGBT EDI and HIV organisations demonstrate otherwise. The policy advisory role of LGBT advocacy organisations within the Quebec state apparatus is the most overt example of the desire of LGBT organisations to influence social policy. Similarly, active engagement with social policy is also seen in HIV organisations and their successful attempts to change provincial HIV funding policy to fit the needs of the contemporary epidemic. As I discuss in Chapter 6, LGBT organisations are heavily involved in the policy process by producing the type of evidence that governments rely on in making policy decisions inclusive of LGBT needs. Yet, as Laforest (2013) notes, the

capacity to engage in policy is contingent upon government priorities, as these consultative arrangements generally lack institutionalisation in Canada. Attesting to this, even in the Quebec case, the consultative role of LGBT advocacy organisations is subject to the Quebec state's continued interest in its agenda for LGBT social equality.

Despite the role of NGOs in policymaking and policy provision, state forces complicate the conditions for survival in the context of long-term same-sex marriage legalisation. Opportunities for resource mobilisation exist, but these are contingent upon regional political, economic, and sociocultural forces, the interests of the political administration in power, existing NGO resources and capacities, the lack of government reform in state and state-sponsored institutions, and the impact of progressive policy shift on these factors. Government funding is competitive and becoming more competitive as funding opportunities remain stagnant (Smith & Phillips, 2016; Phillips et al., 2008) and the number of LGBT organisations grows to respond to evolving LGBT needs (see Chapter 5). Given constraints in government funding opportunities and with resource mobilisation and sustainability at stake, LGBT NGOs have increasingly turned to the market to fill the resource gap.

Market Forces

> *"They (Bank name anonymised) are totally eager… Actually, they're anxious to give us money, if I'm being honest. [Bank name anonymised] isn't like other corporate donors where they sit back and wait for you to come to them… They seem to believe in what they're doing… Their core beliefs are in promoting inclusion. I'm very impressed with them. And there is probably an economic side to it where they're concerned about corporate image." (Community foundation board member, Calgary, Interview 2)*

*

This section examines the market forces affecting LGBT NGO survival in Canada. In the post-same-sex marriage Canadian context, national banks have become the biggest corporate donors to LGBT NGOs in Toronto, Calgary, and Montreal. I discuss the desirability of corporate funding for LGBT NGOs, the corporate desire to fund LGBT organisations, the shift in corporate funding to a more 'ethical' practice, and the politics of corporate funding. As I find, however, not all NGOs benefit to the same degree.

The Market as Funder

Corporations funding LGBT organisations is not new. As early as the 1990s, for instance, the leader of an arts and culture NGO recalled receiving funding from liquor and spirit companies eager to reach lucrative niche gay markets (Interview 6). But increasingly, with the growth of large LGBT events such as the Gay Games (the world's largest LGBT sporting competition) and Pride, the economic power of the 'pink dollar' has arguably become more visible. In 2014, for instance, the buying power of LGBT Americans was estimated at $884 billion (USD) (Witeck Communications, 2015). The assumption is that consumers are likelier to do business with a company that shares its social values, values which are demonstrated in sponsoring LGBT organisations (Interview 72; Barrack et al., 2018). In Canada, national banks have become the most ubiquitous corporate sponsor of LGBT organisations. As such, discussion of corporate donors in this thesis will mostly pertain to these financial institutions, with non-bank corporate donors discussed to a lesser degree.

Once seen as antithetical to an LGBT politics critical of the patriarchal, capitalist establishment, and still seen as such by some activists within the LGBT community, corporations have become increasingly interested and important in funding LGBT organisations. As the board member of a community funder in Calgary observed, "In the last three to four years, LGBT funding from corporate donors has skyrocketed. In the last three years, oil companies have become involved, which you would never have seen before this. Even five years ago, this would have been strange" (Interview 2). The growth of corporate funding availability coincides with the post-same-sex marriage context. But whether corporations became more interested in funding LGBT organisations as a result of changing post-same-sex marriage norms of diversity and inclusion, or whether changing societal norms was the result of increased corporate funding to the LGBT sector is unclear—indeed, both may be the case.

But one thing is clear: with the normalising effect of same-sex marriage for LGBT rights and inclusion, demonstrating support for the LGBT community as a route for corporate social responsibility has become not only accepted but expected. For many Canadian banks, LGBT communities make up one of the key pillars of diversity and inclusion. Funding LGBT NGOs is the most outward method of showing corporate support for these communities. This is visible across cases, where the majority of LGBT NGOs receive some level of corporate sponsorship. But this is especially evident in Toronto, the home of the Canadian headquarters of major banks and corporations. Toronto has the highest percentage of LGBT organisations that rely on corporate funding (see Table 3.3 for

a full breakdown of NGO funding sources): almost 80% of interviewed organisations rely on some form of corporate funding. Calgary is close behind, with about 70% of interviewed LGBT organisations receiving corporate funding. In Montreal, 65% of interviewed groups rely on corporate funding.

But a look at the makeup of NGO corporate sponsorship reveals other structural factors at play which shape access to corporate funds. Of the LGBT organisations receiving corporate funding in Toronto and Calgary, almost 80% are funded by a national financial institution. This cuts across organisational size, age, and wealth. By contrast, just over half of corporately-funded Montreal LGBT NGOs received national bank sponsorship—common corporate donors tend to be Quebec-based financial institutions, telecommunications companies, and media companies. This suggests differences in the NGO demand for bank sponsorship as well as the availability of it in Montreal.

The Desirability of Corporate Funding

There are several factors which make corporate funding an attractive option for LGBT NGOs. Corporate donors have brand recognition in a way that government funding units do not. The names of the five national Canadian banks and the names of large corporations are general knowledge to Canadians. As community giving is generally a large part of corporate social responsibility across industries, these companies will usually fund LGBT projects.

Banks are usually the first stop for LGBT NGOs seeking corporate sponsorship. National banks have a centralised grant program for community organisations—inside connections are not required for funding to be obtained. This is not the case for most corporate funding opportunities outside the banking sector, where members of employee resource groups are key to deciding the community recipients of the corporation's funding (Interview 24). Corporate funding opportunities outside of the banking sector are thus seen as requiring more time, connections, and resources, and are therefore more difficult to obtain. Consequently, competition amongst LGBT NGOs for national bank dollars has become fiercer as the number of LGBT programs and organisations grows in the post-marriage context (see Chapter 5), outstripping available funding.

The application, monitoring, and evaluation processes for corporate sponsorship are also seen as easier and less time-consuming than for government funding applications. For an Ontario-based bank, this amounts to a one to two-page proposal describing "the outcome and impact, number of people the proposal affects, and how it aligns with the

bank's priorities" (Barrack et al., 2018). This straightforward, simplified process is attractive especially for new, emerging, and very small grassroots NGOs with limited time, capacity, and resources to devote to long government grant application processes. As such, I found that these organisations are likelier to obtain corporate funding than to seek or be funded by a government grant. These NGOs may also find it easier to access elite actors and leverage their interests within corporations than in government funding units. For instance, after a sustained campaign of cold-calling corporate donors, one emerging Toronto-based national NGO, which delivers inclusivity training in schools across Canada, was able to secure sponsorship from a major frequent flyer loyalty program to pay for their flights. The sponsorship was game-changing, enabling the group to deliver 400 workshops across five provinces, significantly reducing their operating expenses. Recently, the group secured a sponsorship deal with a major skincare and cosmetics brand, with a portion of skincare line proceeds going to the NGO's program expenses.

Corporate funding also comes with fewer use restrictions than government grants. While this funding is in the form of short-term grants, unlike government grants there is the possibility of renewal. This has led many LGBT NGOs to conclude that corporate funding "creates possibilities that government hasn't been able to" (Interview 48).

However, as LGBT funder sources note, the ease of the monitoring and evaluation processes for corporate grants may become more challenging in the future (Government of Ontario source, 2018). According to one source, national banks are now consulting former advisors who developed the monitoring and evaluation processes for government grants—the same processes maligned by LGBT NGO leaders for being too time-consuming (Government of Ontario source, 2018). Additionally, a major national bank—and dominant player in funding LGBT organisations across Canada—will be changing their metric for impact, a move which other banks may follow (Barrack et al., 2018). Like most other donors, this bank had measured impact by project/event/program attendance numbers. While the connection between attendance and social impact is tenuous, this metric ultimately offered a legible and practical way for NGOs to demonstrate the meeting of project goals. With the recognition that "impact is often intangible" (Barrack et al., 2018), it remains to be seen whether in attempting to more accurately reflect social impact, the new metric will be more resource-intensive for LGBT NGOs.

The Drive to Fund LGBT Organisations

In the post-marriage context, the drive to fund LGBT organisations is such that for largescale events such as LGBT festivals, "it's almost as if [the banks are] falling over each other" to become the headline sponsor (Interview 2). At least one bank has a dedicated team to find LGBT projects and organisations to sponsor. In the contemporary context, the corporate desire to fund LGBT organisations still has a "business imperative" (Interview 72). But whereas it was previously centred around selling products to niche markets (i.e. LGBT people and their allies), this business imperative is now more multi-dimensional, encompassing the need to attract and retain employees, and offset the corporate footprint by doing social good. These drivers can be applied to financial institutions across Canada.

But the desire to sponsor ultimately comes down to elite interest within the corporation, a tenuous arrangement that can disappear with the actor. For an Alberta-based bank, it can be traced to their former CEO. In the early 2000s, this individual spearheaded the bank's adoption of LGBT diversity and inclusion policy, LGBT NGO sponsorship, and the inclusion of LGBT imagery in their marketing. This occurred as vocal corporate support for LGBT communities was uncommon in Canada, let alone Alberta. As such, the bank experienced some societal pushback. But motivated by a rebel attitude characteristic of western regionalism, the CEO pushed onward with the mentality that "if you tell me I can't do it, it's the best motivation to get it done" (Interview 23).

To be sure, a sense of social justice was an important factor in this transformation. But tellingly, when rationalising why a bank in an historically socially conservative province would take such a strong pro-LGBT stance, he invoked western regionalism:

> "Albertans are more entrepreneurial, where there are less big businesses and more small businesses, more people who see themselves as different—whether it's about being an owner of a small business or being outdoorsy. This is sort of a new frontier and there are people who see themselves as being a renegade… People who are different themselves are less likely to treat others who are different badly." (Interview 23).

Demonstrating the influence of societal forces, the bank's pro-LGBT corporate culture was not in spite of western regionalism, but because of it. I find that rather than necessarily oppositional to inclusion of sexual and gender diversity, the western regional mentality—one often associated with the frontier and popularly characterised as hypermasculine (Miller, 2003; Hogan & Pursell, 2008; Harter, 2004)—can be sympathetic to LGBT identities over shared difference. The culture of western regionalism and how it shapes the perceptions and behaviour of economic actors as "mavericks" accustomed to "going [their]

own way" has thereby made possible the corporate funding opportunities for LGBT NGOs in Calgary (Interview 3).

As with NGOs, as discussed earlier, this reflects the extent to which conservative regional norms are not only active in urban centres of Alberta—challenging existing scholarly assumptions (Sayers & Stewart, 2013)—but shape the economic realm of possibility for the LGBT NGO sector through the behaviour of corporate donors. These findings add to existing scholarship on the drivers of corporate funding for social good, or corporate social responsibility. My findings suggest that corporate social responsibility, as it is manifested in donating to social organisations, is not simply motivated by appealing to consumers, attracting and retaining employees, or because it is the 'right' thing to do (Lindgreen & Swaen, 2010; Vogel, 2005; Sweeney & Coughlan, 2008). Expanding our understanding of corporate social responsibility, my findings highlight the role of elite personal interests and of deeper regional sociocultural norms at work in shaping social action.

In addition to the preferences of elite actors, the impetus to fund LGBT organisations may also be grounded in risk averse management practice. Interestingly, while Canada's national banks are competitors, diversity and inclusion is one area in which the major banks are "hand in hand together" in collaboration (Interview 75). Best practices are shared, and the banks follow each other's lead. In fact, a single instance of a bank poorly treating a disabled customer spawned this collaborative practice. Once the story reached the media, it resulted in a costly, time-consuming public relations nightmare for the entire banking sector—all because of one bank's misstep (Interview 75). As a result, Canada's major banks have all gravitated to adopting similar diversity and inclusion policies around minority groups, including LGBT communities.

To be sure, the banks still compete in outwardly demonstrating diversity and inclusion by funding LGBT NGOs. But in this isomorphic environment in which organisations gravitate to adopting similar discourses and practices to each other (DiMaggio & Powell, 1983), the implication is that all it takes is one bank to move the entire banking sector forward on LGBT issues. It also means that it is economically and socially costlier for the bank—profit- and reputation-wise—not to demonstrate a commitment to LGBT communities, in corporate policy and in outward practice. In other words, it may not be daring for a Canadian bank to fund LGBT NGOs so much as it is the bank being risk-averse and looking after its economic bottom line. As my findings show,

risk aversion makes possible the corporate LGBT diversity and inclusion values which in turn make possible the current environment of LGBT NGO funding opportunities.

'Ethical' Corporate Funding Practices

While corporations have a business, social, and sometimes personal interest in supporting LGBT NGOs, at baseline the funding relationship is a "business partnership" (Barrack et al., 2018). Thus, LGBT grant proposals are judged on the extent to which projects align with the corporation's priorities. But to interpret these corporate priorities as purely profit-driven would be an oversimplification. As a senior banking executive explained, "There are needs within the community but also the areas that we can focus our resources on to really make a difference" (Interview 72). Given finite resources, this suggests a strategic approach to funding social impact: channelling resources to areas the corporation knows it can produce sustained social change, rather than funding organisations across the board. Of course, this means that fewer LGBT organisations and activities may benefit from corporate funding, or conversely that NGOs gradually shift their work to match what the banks are funding. It may also mean that corporate donors may increasingly favour registered charities, a trend observed by many LGBT NGO leaders. Apart from the ability to issue tax receipts for donations, which benefits the corporation, charitable status signals legitimacy to the corporation and the capacity to responsibly use sponsorship funds (I explore this in greater detail in Chapter 6).

Further, socially responsible funding practice ensures that as much of the money goes to programming and services rather than organisational overhead. To do this, one major Ontario-based bank is now moving away from sponsoring gala fundraisers. A diversity and inclusion executive explained that:

> "We're starting to think about efficient use of funds where we're now moving away from sponsoring the gala event and looking at how the money can be used for actual services. We recognize that [bank name] grants are the bread and butter for a lot of organizations and so we're not cutting it off completely. But we're moving toward a model where no more than 25-30% of bank dollars go to event funding" (Interview 72).

This is a trend seen more broadly in philanthropy and development, where even LGBT NGOs—as "ethical and responsible charit[ies]"—are re-evaluating the ethics of fundraisers, given how much funding is required to hold them and does not go directly to programming (Interview 47). This underscores the drive amongst LGBT NGOs to build and foster philanthropic relations with individual donors, which I explore further in

Chapter 6. However, building philanthropic relations is a time- and resource-intensive endeavour placing older and well-resourced NGOs at a significant advantage. Unlike under-resourced and newer organisations, these groups can demonstrate legitimacy (or tell compelling narratives of it—see Chapter 6) through an established track record of achieving their objectives.

Additionally, I find that banks are collectively moving toward a 'partnership' model with funding recipients. This approach is about being a "year-round partner, not just one-event involvement" (Interview 72). In seeking to "go beyond the logo," banks are shifting the donor-recipient relationship from silent donor to community partner, from a transactional dynamic to a mutually beneficial one (Interview 72). What this means is that corporate donor support may no longer be strictly financial in nature, or financial at all. LGBT and HIV NGOs, for instance, described corporations donating based on whether the organisation can provide a volunteer experience for corporate employees.

Some in the LGBT sector have welcomed this shift towards what they perceive as a more genuine partnership, an interest in the organisation, and a real investment in employee growth through community service. But it is not without its challenges. For NGOs working in sensitive areas such as HIV and LGBT mental health, untrained volunteers working with vulnerable clients poses a risk. As an alternative, bespoke volunteer experiences were created. This illustrates that being able to host corporate volunteers requires producing a rewarding volunteer experience that does not necessarily already exist at the organisation.

In effect, not all NGOs can afford 'genuine partnership' and ethical corporate funding practices. Ultimately, this ethical allocation of resources echoes 'value for money' discourse, a concept typically applied to highlight the extent to which cost-effectiveness is the primary concern in decision-making and one pertinent in the funding of NGOs (Ishkanian, 2014). My findings complicate this understanding by showing how ethical corporate funding practices evoke both cost-effectiveness and a desire to maximise a sustained social impact. As I suggest, the line between value for money and funding strategically for social good may be blurrier than we think.

The Politics of Corporate Funding

There is a clear paradox, however, in relying on corporate funding. In order to promote LGBT inclusivity and reach groups most marginalised by neoliberal, globalised, capitalist forces in society, LGBT organisations must rely on the corporate engines of those very

forces. To reject the funding on ethical principles would be to reach fewer people and to limit the scope of doing social good.

The politics of relying on corporate funding varies across cases. As local industries, Calgary's oil and gas companies donate to LGBT organisations. But due to the makeup of available corporate, government, and government-sponsored funds, NGO leaders have a very utilitarian attitude about the politics of where their funding comes from. The only hesitation to using oil and gas money stemmed from the volatility of the industry and how this may affect available NGO revenue sources. Otherwise, the mentality in Calgary's LGBT sector is that while corporate funds may come from unsavoury sources, the abundance of it can be put to social good. As one leader of a major LGBT NGO quipped, "In Calgary, you're in bed with the devil no matter what. You can either make it work for you or not" (Interview 5).

Toronto organisations were likeliest to echo ethical issues but pursue corporate money anyway, rationalising it as crucial to their operations and enabling possibilities. For organisations with a more radical political ethos, corporate funding is rationalised not as antithetical to grassroots social change but crucial to enabling it—but there is still room to be deliberate about which donations to accept. As one HIV NGO executive summed up, "Hell yes, there is a conflict of interest in what LGBT organisations and ASOs do and where they get their money, and this is the reality of it" (Interview 67). Accordingly, tensions may arise within the organisation. For example, a community development program received pushback over funding from two national banks—pushback "not from the community but within the staff" (Interview 50). As its leader explained:

> The staff speak on *behalf* of the community and present it as if the community is the one that's angry. But the community isn't saying anything. Frankly, the community doesn't care about where the money is coming from as long as the programs are there and running. [Bank name anonymised] and [bank name anonymised] haven't asked us to use their logos on the materials, so the community doesn't actually know that corporations are funding the programs. But the staff do. (Interview 50)

These tensions can also spill out into the community, as major LGBT festivals illustrate. Corporate funding has been crucial to the growth of these events from a parade to a weeks-long festival celebrating LGBT culture and inclusion (see Chapter 5). In turn, LGBT festivals have become lucrative marketing platforms for corporate donors. But this corporate-NGO symbiosis has come under fire from activists in the community and within the organisational membership over perceptions of growing accountability to corporate stakeholders at the expense of the community (Knutsen & Brower, 2010).

By contrast, Montreal organisations have been less quick to embrace corporate funding. NGO leaders highlighted the obligation of the state in Québécois regionalism to fund NGO services, as well as ethical qualms, revealing moreover the path dependence of the city's LGBT organisations in relying on government funds. But as Montreal's LGBT sector expands, overreliance on government funding is increasingly untenable. Yet, barriers exist in applying for corporate funding. Preoccupied with the project funding cycle, many organisations require more funding before they have the resources to apply for corporate funding. Moreover, the pool of available corporate funding in Quebec is limited, first by weak giving behaviour amongst Francophone corporations. As such, most banks and corporations interested in funding LGBT NGOs are Anglophone and based outside of Quebec—in fact, in Toronto. But pursuing Anglophone corporate funding runs into linguistic and cultural barriers: "You have to go through Toronto, and they don't necessarily understand the Montreal market" (Interview 30). There is also a sociocultural preference to seek funding from 'home-grown' Quebec corporations with deep ties to the province (Interviews 19, 75). However, this opportunity is closing as NGO demand outstrips corporate supply. As a senior management official in a Quebec-based bank acknowledged, Quebec's banks are not expanding their existing "payroll" of LGBT NGOs (Interview 75). This leaves LGBT NGOs to seek funding from Quebec corporations outside of the banking sector, a considerably more formidable task.

The regional politics of corporate funding can therefore facilitate or impede the opportunity for corporate resource mobilisation. Governed by business imperatives, risk aversion, elite interests, and regional political, economic, and sociocultural forces, major corporate revenue streams are shifting as Canada's banks embrace more 'ethical' funding practices. While corporate funding has alleviated the resource gap for many LGBT NGOs, rising demand for funding across cases threatens to outstrip the carrying capacity of corporate funding in the post-marriage context. As I show in the next chapter, rising demand can be traced to the expansion of issues and identity groups long after progressive policy shift. Constraints on resource availability and thereby resource mobilisation therefore make resource dependence—and, as I demonstrate in the next chapter, growing resource dependence—a problem of survival. Progressive policy change—getting what organisations want—is shown to be costly, even untenable.

Conclusion: Progressive Policy Shift Affects Organisational Survival Through Societal, State, and Market Structures

In this chapter, I have shown how long after progressive policy shift, societal, state, and market forces affect NGO resource dependence, the availability of necessary resources, and the capacity of NGOs to mobilise these resources. Some of these forces are pre-existing political, economic, and sociocultural structures. Others are directly and indirectly related to progressive policy shift. These structural forces reflect social, political, and economic ecologies that are an amalgam of developments at the local, provincial, and regional levels and interactions between these levels and the federal centre. Through Western regionalism and Québécois regionalism, I showed how the impact of provincial/regional-federal relations on societal, policy, and market ecologies is most evident in the Calgary and Montreal cases. The impact of interdependent structural forces and the interaction of these structural forces with progressive policy change heavily shape the opportunity structure for organisational persistence.

Regionalism is shown to affect the behaviour of NGOs, shaping funding preferences, how NGOs interpret their mission, and heavily affect the availability of resources by circumscribing individual donor behaviour. The provincial policy ecology is also shown to most affect the lives of LGBT NGOs, drawing from the funding-based relationship between NGOs and the state. Through its role as funder, the state enables or constrains the realm of possible NGO action. Reflective of broader funding patterns in development, government funding is now largely project-based across cases, presenting barriers to program continuity. In Montreal, *Action Plan* funding enlisting LGBT NGOs as agents of a nation-building project of LGBT social equality is a product of a triad of sociocultural, political, and economic forces: Québécois regionalism, neoliberalism, and same-sex marriage. Across cases, geographic and political scale present funding barriers through scalar constraints, but can create narrow opportunities and expectations for additional state funding. Moreover, as I find, bureaucratic inertia in state and state-sponsored organisations can in certain instances act as an environmental buffer, shielding LGBT organisations from survival pressures. Regional examples at the provincial government and regulatory level challenge existing scholarly interpretations of bureaucratic inertia as necessarily non-beneficial or even regressive to the organisation and to policy implementation.

Further, I find that corporate donors and especially financial institutions have become one of the most ubiquitous funders of LGBT organisations in Canada. This is

particularly the case in Toronto and Calgary where strong patterns of individual giving and the presence of corporate headquarters translates into a large supply of and demand for corporate donations. The ease of obtaining and using corporate funding has provided the impetus for LGBT organisations to turn to these donors to fill the resource gap left by declining and restrictive government funding. Funding LGBT NGOs is the most outward show of support for the LGBT community as a key corporate pillar of diversity and inclusion, a performative gesture aimed at consumers but also current and potential employees. But as bank executives show, the preferences of elite actors matter in the corporate desire to fund LGBT NGOs, as does the sticking power of regional sociocultural norms and risk aversion. However, as banks seek to be more strategic in their funding practice, this creates resource intensive challenges for LGBT NGOs, blurring the line between cost-effective and ethical funding practice. Ultimately, however, relying on corporate sponsorship to fund social good is embedded in a paradox that LGBT NGOs negotiate differently across cases, a function of sociocultural and political norms and regional funding opportunities. In this regional political economy of corporate funding, not all organisations benefit from the corporate funding opportunities to the same degree.

In the context of long-term policy progress, structural forces independent of and related to progressive policy shift are shown to act upon LGBT organisations and affect resource dependence, resource availability, resource mobilisation, and thus sustainability. Structural forces such as the rise of contemporary identity politics in Toronto, changing giving behaviour amongst gay donors in Calgary, *Action Plan* funding in Montreal, the unmet NGO expectations of the LGBTQ2 Special Advisor and Secretariat, and the growing corporate interest in funding LGBT organisations across cases demonstrate how policies which advance organisational goals can subsequently affect the sustainability of those groups through changes to societal, state, and market structures. Importantly, these examples illustrate the impact of progressive policy shift on state and market organisations in the LGBT policy domain. In this chapter, I have established the influence of long-term progressive policy change on LGBT NGO survival by focusing on the impact of structural forces on the organisation. In the next chapter, I explore how progressive policy shift in and of itself can affect the organisation.

5. The Impact of Progressive Policy Shift on the Organisation

"If you asked me ten years ago, I would have thought that LGBT organisations would have disappeared after same-sex marriage. Now, I think it's the opposite. With identities such as trans and non-binary becoming more vocal, there are more organisations now." (EDI NGO leader, Toronto, Interview 76)

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"In the past, people would come together around issues of marriage, adoption, and employment. Back then, there was more political power because the LGBT vote was in the millions. Now, it's 'people of colour are here too,' 'women are here too,' 'trans people are here too.' The LGBT vote has split up. There is less political power." (Arts and culture NGO leader, Montreal, Interview 30)

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"The target audience for LGBT organisations is so diverse that this requires more resources to target all the different parts of the community. But no organisation has the resources to do this" (LGBT sector development expert, Toronto, Interview 67).

*

In the previous chapter, I showed how political, economic, and sociocultural structures affect LGBT NGO persistence after long-term policy progress. Independent of and in conjunction with progressive policy change, societal, state, and market forces interdependently shape resource dependence, the availability of resources, and the capacity for resource mobilisation. But sociocultural, political, and economic structures are not the only factors affecting the post-marriage space for organisational survival. In this chapter, I demonstrate how progressive policy shift in and of itself—a policy change which advances one or more of an organisation's stated goals—impacts the sustainability of LGBT organisations.

Across issue areas and cases, I show that LGBT organisation missions are all affected in some way and to differing degrees by virtue of being in the same LGBT policy arena. As such, long-term same-sex marriage impacts organisations we might expect to be affected, such as advocacy organisations, for whom same-sex marriage achieved a 'pinnacle' goal or even resulted in mission accomplishment. But it also affects groups we might not expect to be affected. This includes service providers, for whom same-sex marriage legalisation was not an ultimate organisational goal because they are primarily focused on the provision of social and human services. Nevertheless, long-term same-sex marriage advances their broader goals around achieving lived equality for LGBT

communities. As such, same-sex marriage constitutes a progressive policy shift for these organisations, thereby impacting the opportunity structure for long-term persistence.

To demonstrate this, I first examine how same-sex marriage affects organisational development in the LGBT policy domain. I show that immediately following same-sex marriage, many EDI LGBT organisations navigated the possibility of closure—but that this was not a necessary outcome of marriage equality and was structured by societal and state forces. Long after policy progress, heightened focus on within-group difference has led to expanding issues and identity groups in the LGBT community. In response, specialist organisations have emerged as large generalist NGOs expand their missions.

Next, I examine the wide-ranging impact of progressive policy shift on the organisational mission. Amidst changing local and global sociocultural, political, and economic forces, missions may 'drift' or travel to other regional contexts. These forces may also help to produce new issue areas for organisations to address. To navigate growing community diversity, LGBT NGOs make strategic decisions about whether and how far to limit the bounds of their missions, reflecting the need to balance available resources, community and sector perception, and the desire to do social good.

Finally, I explore the impact of progressive policy shift on an underexamined area of the organisation: organisational capacity. I illustrate how fundamental changes to citizenship and the LGBT life course affect the sustainability of human resources. But policy progress also creates opportunities for organisational capacity: evolving identity discourses have configured young people as resources for organisational renewal. But as I show, policy change may also produce unintended consequences for LGBT NGO capacities by giving rise to new competitors and placing heightened emphasis on NGO actor identity as a measure of organisational legitimacy. As NGOs seek to correct the underrepresentation of women in their organisations, I posit why these efforts may face persistent obstacles, highlighting the role of demographic changes and the normalisation of sexual and gender diversity—developments brought about by policy progress.

Overall, I show how a policy change which advances organisational goals can subsequently affect the livelihoods of those very organisations. While the resolution of same-sex marriage created the space for other issues and groups to emerge or gain focus, in doing so, it has made service provision and advocacy costlier resource-wise and legitimacy-wise. It has also produced social and demographic changes which, while ostensibly beneficial to LGBT livelihoods, may hamper sustainability and efforts to enhance diverse representation within organisations. With impacts to the organisation

itself, long-term policy progress has created the conditions for heightened resource dependence, making LGBT NGOs increasingly prone to the societal, state, and market structures shaping resource availability and resource mobilisation (see Chapter 4).

The Impact of Policy Shift on Organisational Development

In this section, I illustrate the impact of progressive policy shift on the organisation by focusing on organisational development in the LGBT policy domain. As I find, same-sex marriage legalisation affects the 'life cycle' of LGBT NGOs. My use of the organisational life cycle concept refers broadly to organisational progression through various stages of emergence, growth, development, and death rather than notions of evolutionary determinism or normative concepts that organisational progression necessarily leads to a 'better' organisation (Lester et al., 2003; Greiner, 1998; Lewis, 2014).

As I show, progressive policy shift in the immediate and long-term prompt transition into different stages of the organisational life cycle—transitions which are shaped by sociocultural, political, and economic structures (see Chapter 4). Immediately following same-sex marriage legalisation, I find that EDI groups faced the possibility of organisational demise due to the achievement of a prominent goal or pre-emption of other goals. However, in the case of Montreal, EDI groups were buffered from the possibility of demise following goal attainment due to structural forces: their role in social and political governance in Québécois regionalism. Long after same-sex marriage, the growth of issues and identity groups in the LGBT community has prompted the formation of new 'specialist' organisations and resulted in the contentious expansion of 'generalist' LGBT organisations. More broadly, these findings speak to the role of progressive policy shift in organisational development.

In this thesis, the organisation is a specialist one insofar as their mandate is narrowly focused, where they focus on serving or advocating on behalf of a very limited number of identity groups (e.g., one group under the LGBT umbrella, such as trans people) and the issues pertaining to that identity group(s). Generalist organisations have large mandates, focusing on serving or advocating on behalf of a wide range of identity groups (e.g., most or all groups under the LGBT umbrella) and the issues pertaining to those groups. Specialist organisations tend to have fewer resources owing to their limited mandate and these resources are focused on the smaller range of issues and identity groups in this mandate. By comparison, generalist organisations tend to have more resources

owing to their large mandate and these resources are spread out across the wide range of this mandate. However, as I discuss throughout the following chapters, generalist organisations in this thesis vary in their resource level. Not all have significant resources to address their mandate and many generalist organisations attempt to address their wide mandate with few resources.

Thus, in this thesis, the primary characteristic distinguishing specialist organisations from generalist organisations is the size of their mandate. Resource levels are associated with this but do not determine whether the LGBT NGO is specialist or generalist. This builds upon concepts of the issue niche, which is a space for issue stakeholders to interpret, attach significance to, and address an issue through cooperation, competition, and/or conflict (Yang, 2020). The size of the issue niche is shaped and reshaped through discourse among issue stakeholders and the public, producing evolution of the issue (Yang, 2020). It affects the organisational identity by outlining what an NGO does and does not do and affects the resources that are potentially available to the NGO (Browne, 1990; Yang, 2020).

As Yang (2020) notes, the issue niche includes and expands upon the resource niche typically associated with niche theory. In niche theory, niches are defined by the resources in the environment: resource access determines whether organisations become specialists or generalists; generalists tend to occupy wide niches and specialists tend to occupy narrower niches; and generalists generally do not compete with specialists (Freeman & Hannan, 1983; Carroll & Hannan, 2000). My operationalisation of specialist and generalist organisations differs from the conceptualisation within niche theory by foregrounding the organisational mandate (issues and identity groups) as the primary factor in determining specialist and generalist niches. In conjunction with my concept of how progressive policy shift affects organisations in a policy domain (see Chapter 2), it highlights the possibility of competition between specialist and generalist organisations. As I noted in Chapter 2, in my concept of the policy domain, progressive policy shift has the potential to affect the competitive trajectories of organisations so that organisations that were previously non-competitive in relation to one another are pitted against each other. As I illustrate in this chapter with respect to trans issues, this competition includes specialist and generalist organisations.

Niche theory also states that generalists are favoured in changing environments while specialists excel in stable conditions (Freeman & Hannan, 1983; Carroll & Hannan, 2000). This owes in large part to the level of resources that generalists versus specialists

tend to possess in niche theory. However, as I noted earlier, resources do not determine whether an organisation is a generalist or a specialist in the context of this thesis. As such, there is no hard and fast rule in this thesis that generalist LGBT organisations necessarily fare better under changing conditions than specialist trans-focused groups. As I illustrate in this chapter and in Chapter 6, generalist organisations are not necessarily at an advantage in navigating changing environmental conditions and may in fact face additional hurdles associated with their wide-ranging mandate.

Organisational Mortality Following Policy Shift

One possible but drastic outcome following progressive policy shift is organisational death. Organisational death occurs when the group decides to cease all operations and close (Helmig et al., 2014). In the case of NGOs, this may occur when they have accomplished their mission (Helmig et al., 2014; Hager et al., 1999). For instance, the attainment of same-sex marriage or same-sex domestic partnerships fulfilled the ultimate goals of many LGBT rights organisations in countries including the United States, causing the closure of these groups (Hildebrandt, 2018; DeFilippis et al., 2018). Thus, we would expect this to have also occurred in the Canadian context following the passage of the 2005 *Civil Marriage Act* which legalised same-sex marriage nationwide.

In line with expectations, same-sex marriage legalisation fulfilled the missions of marriage-focused advocacy groups in Canada, leading to organisational closure (Smith, 2008). It also fulfilled a prominent goal of the leading national LGBT EDI organisation. As its leader explained:

> "When I took over in 2007, [the organisation] had closed their offices. There was no money. My office was just a computer in someone else's office at [organisation name anonymised], a Conservative queer political group. Same-sex marriage sucked the oxygen out of [the organisation]… Donations had dropped." (Interview 69)

With an exhausted membership and little funding left, the organisation faced closure. However, as I discuss later in this chapter, it managed to pivot its focus to avoid this fate. In a bid for survival, it shifted from litigation-based same-sex marriage activism to education and research as routes to achieving its mission of LGBT lived equality. Averting death, the group rose to become one of the largest, most well-resourced LGBT NGOs in Canada.

But same-sex marriage did not only affect organisations which had advocated *for* marriage. Also facing organisational demise was a Toronto-based queer liberationist group with a vastly different mission. Opposed to the limiting nature of rights, this group was

ideologically against the concept of marriage as it afforded social and financial benefits to one type of relationship above all others. As such, same-sex marriage legalisation did not achieve its mission but pre-empted further pursuit of a key part of its platform. With an exhausted membership and declining support in the wake of a major policy defeat, the capacity to pursue the rest of its platform was up in the air. Consequently, immediate survival was threatened and the group eventually closed—though as I discuss in Chapter 6, it was later resurrected in a different form.

This demonstrates the impact of progressive policy shift on competing organisations pursuing different missions in the LGBT policy domain. Like its pro-marriage opponents, the queer liberationist group ultimately worked towards a goal of improving the wellbeing of LGBT people in society. Thus, while not achieving its liberationist goals, marriage equality did instrumentally advance its goal of improving LGBT wellbeing insofar as the policy shift gave LGBT Canadians the option of marriage and elevated their legal rights. For this group, marriage had always been a means to an end rather than an end in and of itself. Same-sex marriage legalisation therefore still constituted a progressive policy shift for the group even if its ultimate vision was not yet achieved. In the end, the group got a small portion of what it wanted. This underscores my contention in this thesis that getting what organisations want cannot be reduced to concepts of success (see Chapter 2). As these examples show, it may instead be more accurately captured as a policy shift which advances one or more of the organisation's goals.

Contrary to expectations, however, same-sex marriage legalisation did not produce an organisational mortality crisis for rights-focused EDI groups in Montreal. Neither NGOs nor the provincial government saw the resolution of marriage as the end of the road for these groups. The post-marriage relevance of Montreal's EDI groups is embedded in Quebec's corporatist style of policymaking (Laforest, 2006). As noted in Chapter 4, the role of LGBT NGOs in social and political governance in Quebec is deeply embedded in the sociocultural force of Québécois regionalism. In this corporatist arrangement, the third sector is built into the policy process with LGBT NGOs playing policy advisory and LGBT interest representation roles. Reflective of a Quebec tradition of civic action, LGBT NGOs are vehicles for social action and correcting social justices in society (Laforest, 2006). As I discussed in the previous chapter, these groups are instrumental to achieving the state's vision of LGBT equality in the post-marriage context.

As such, immediately following same-sex marriage legalisation, provincial-level LGBT advocacy NGOs continued to be active and predominantly funded by the Quebec

government, complementing the EDI activities of other groups. Unlike their Toronto counterparts, these groups were buffered (see Chapter 4) from the possibility of demise following policy progress due to the societal and state structure of Québécois regionalism (see Chapter 4). This illustrates how larger sociocultural, political, and economic structures mediate the impact of progressive policy change on organisational development.

The Formation of 'Specialist' Organisations

As discussed in the previous chapter, the resolution of same-sex marriage created the space for a proliferation of identity groups to be recognised and issues to emerge across cases. This underscores the contemporary preoccupation with difference within the LGBT community, with the focus on these marginalised identities guided by the popular emergence of intersectionality in addition to identity politics (see Chapter 4). The response to this growth of issues and identity groups has been, on the one hand, the formation of new specialist organisations focused on specific identity groups and issues. This speaks to a broader trend hypothesised by Smith and Phillips (2016) in which smaller NGOs will emerge partly due to the enthusiasm for social innovation as social needs increase and diversify. This is shown in the case of trans issues.

In the post-marriage Canadian context, the expansion of social media and multimedia has meant that a range of LGBT groups has attained greater visibility and on more public platforms than before. For vulnerable and intersectional groups in the LGBT community, heightened visibility has been a double-edged sword which may expose individuals to more prejudice. This was the case for trans people. Increased coverage about trans people and trans issues in popular culture, mainstream television, in the media, and on social media has resulted in greater trans visibility in society (Fischer, 2019). But increased visibility has been met with transphobic backlash in the form of anti-transgender legislation such as 'bathroom bills' (Fischer, 2019). In these debates, the very legitimacy of trans identities and rights have been publicly denigrated by opponents over whether trans people should be allowed to use the restroom corresponding to their identified gender (NCSL, 2020; Grinberg & Stewart, 2017).

The impact on trans people but especially vulnerable trans youth has been pronounced, with direct implications for mental and physical health (Frost et al., 2015). Illustrative of this, the demand for trans-specific mental health and social support services has risen dramatically across cases. LGBT health organisations in all three cities have experienced rising demand for helpline services for peer-based and professional

counselling, and rising demand for individual and parental resources on sex, sexuality, and gender, especially for trans issues. In Toronto, province-wide calls to a peer-based helpline run by an LGBT youth organisation have doubled between 2013 and 2017 to over 5,000 per year (Interview 48).

Consequently, trans activists and parents of trans youth in Calgary and Montreal have responded by creating trans-focused NGOs. The emergence of trans issues in full force after same-sex marriage spurred the formation of Calgary's trans youth organisation in 2016. This filled a gap in the city's LGBT rights organising, one vacant since the late 1990s when the city's LGBT rights organisation folded. In both Calgary and Montreal, the emergence of trans youth organisations has resulted in skyrocketing demand for other types of trans-related support, a development which has expanded their missions.

The formation of trans-specific organisations speaks to the complex position of trans identities within the LGBT community. As a minority within a minority, trans identities are often overlooked in the LGBT community and in LGBT discourses, advocacy, and service provision. There is often an assumption of a shared 'LGBT' experience reflected in LGBT-oriented resources and services, ignoring fundamental differences in trans experiences stemming from the complexities of gender identity—even the 'coming out' narrative differs for trans people (Newhouse, 2013; Zimman, 2009). Trans issues have also historically been marginalised in LGBT advocacy (Greer, 2018; Johnson, 2017). Community marginalisation and differences in needs from LGB people underlies the formation of these specialist trans-focused organisations (Graves, 2018). As I elaborate below, it also speaks to the fraught position of trans identities and issues within larger LGBT NGOs.

The Expansion of 'Generalist' Organisations

The rising demand for trans resources and services is one example of the impact of expanded issues and identities in the post-marriage era. More generally, this has translated into more issues to address and needs to meet via advocacy and service provision across issue areas, but especially in EDI, community development, and health. Across cases, many of these new and renewed issues have been taken on by large, well-resourced EDI and community development organisations—generalist LGBT NGOs, which focus broadly on a range of identity groups under the LGBT umbrella. Gradual additions of trans, non-binary, and intersex issues to already large portfolios have resulted in organisational expansion, propelling continued organisational persistence long after same-sex marriage.

But this practice of expanding mandates—that is, the issues and identity groups that the organisation focuses on under its broad social mission (see Chapter 2)—is rife with tensions and risks to organisational legitimacy.

First, the expansion of generalist mandates stirs debate over whether some organisations have more of a 'right' to address and represent certain issues over others—for instance trans-focused specialist organisations and trans issues (Pearce, 1997). However, this is complicated by the very intersectional context in which these 'new' issues and groups have emerged: generalist NGOs may face pressure from sector colleagues and the community to expand their mandates to better represent growing community diversity. In Toronto, for example, a major community development NGO was accused by a group of radical activists for 'not doing enough' to support black trans women, with the centre's leader slandered on social media platforms. A Montreal-based NGO which runs Francophone diversity and inclusion workshops in schools faced similar criticism from sector colleagues for not including trans issues in their mandate and focusing only on LGB issues—in fact, what they specialised in.

These debates are further complicated by resource disparities. As I outlined in the previous chapter, societal, state, and market structures create challenges for resource mobilisation. Large generalist LGBT NGOs are typically more resource-rich, long-established, and therefore have greater resource mobilisation capacities to tap state, market, and philanthropic sources of revenue (see Chapter 4). With greater resource mobilisation capacity, these NGOs are well-equipped to take on new issues and clientele and navigate the increased resource dependence that results. As such, they may be able to provide continuity of service provision where new specialist organisations cannot.

Related to issues of legitimacy, mandate expansions also speak to debates about the authenticity of large, well-resourced generalist NGOs. For instance, the leader of a Montreal-based community development NGO commented that they become suspicious when large organisations "suddenly care about gender identity" (Interview 25). Similarly, the leader of another Montreal-based community development organisation suggested that the range of issues that the city's EDI groups have absorbed into their mandates—including same-sex domestic violence, trans issues, gay conversion therapy, and addressing LGBT inclusivity within "each and every set of laws within the ministries"—reflects "a restructuring of the organisation to still be able to do advocacy" after same-sex marriage (Interview 35).

In other words, the expansion of generalist mandates, especially when they absorb issues of the contemporary zeitgeist such as trans and gender identity, may be perceived as a strategy for organisational continuity. As the leader of a queer women's NGO summed up, "It's a political thing. Projects that are on topics that are 'trending' are ones that get funding" (Interview 32). More broadly, such debates recall controversies elsewhere around generalist LGBT NGOs, where mobilisation around more marginalised issues and identity groups occurs only when it suits the NGO's strategic purposes. In the US context, for example, prior trans-exclusionary policy stances of the Human Rights Campaign, the largest LGBT rights organisation in the country, have called into question the authenticity of their stated commitment to trans issues (Johnson, 2017).

In a paradoxical dynamic, policy progress has therefore both created the space to tackle more critical issues and reach more communities, but has also given rise to the very political climate which subjects these practices to greater scrutiny. As generalist NGOs respond to evolving identity groups—and indeed shape those identity groups, whether by accident or design—service provision and advocacy have become more resource intensive, producing greater resource dependencies. As one funding development expert in the sector explained, "The target audience for LGBT organisations is so diverse that this requires more resources to target all the different parts of the community. But no organisation has the resources to do this" (Interview 67). Illustrative of heightened resource dependence, community funders have seen a growth in the number of LGBT programs and organisations seeking funding—in Calgary, as much as a five-fold increase. In the post-marriage context, I suggest that generalist organisations may face the growing risk of doing too much with too few resources, with implications for service quality and continuity, and policy/issue advancement in advocacy. As discussed in the previous chapter, these risks are exacerbated by structural constraints to resource availability and resource mobilisation. It has become additionally costlier to organisational legitimacy as NGOs face criticism from within and outside the organisation over how to meet community needs and represent community diversity.

Long after same-sex marriage, NGO development in the LGBT policy domain is marked by the contentious expansion of generalist LGBT mandates, the formation of specialist organisations, and the threat of organisational closure. Across cases but especially in Toronto and Montreal, the result is that there are more LGBT organisations now than ever before (Interview 76). This evolution in organisational development is a response to changing dynamics within the LGBT policy domain as a result of progressive

policy shift—reminiscent of Korten's (1990) life cycle framework of NGOs, in which growing awareness of community needs helps drive organisations into different stages and directions of development. They are further shaped by social, political, and economic forces, including the growth of corporate funding and in Montreal's case the growth of provincial government funding (see Chapter 4). These structures have provided a window for organisational formation and expansion, an opportunity which is now narrowing as demand threatens to outstrip the supply of available resources and corporate donors shift their funding strategies (see Chapter 4). As I suggest, continued NGO formation and expansion may be unsustainable in this funding context. More broadly, these findings expand understanding of the role of progressive policy shift in organisational development.

The Impact of Policy Shift on the Organisational Mission

In this section, I demonstrate how progressive policy shift affects LGBT NGOs through impacts on the organisational mission. As I show, missions may 'drift' or travel to 'new' regional frontiers. As well, NGOs may turn to new issues entirely as same-sex marriage legalisation contributes to challenges in the global arena. Responding to evolving community diversity and growing needs, generalist LGBT NGOs are shown to make strategic decisions about the size of their mission, balancing available resources with the desire to do social good.

Mission Drift

Mission drift is a possible outcome of policy progress for LGBT NGOs. Mission drift broadly occurs when organisations behave in ways which do not appear to align with their image or values (Grimes et al., 2019). This may include neglecting the major goals they claim to pursue in favour of goals associated with maintaining the organisation (often referred to as goal displacement—Warner & Havens, 1968), or deviating from the stated major goals in pursuit of a different ultimate goal altogether (Jones, 2007). Because mission drift produces discontinuity between organisational identity and actions, which may be perceived by audiences as the organisation behaving inauthentically, the term is frequently used in a pejorative sense or is conceptualised as something to avoid (Conforth, 2014; Jones, 2007; Rothschild et al., 2016). However, my use of mission drift in this thesis is value-neutral. As I show, there may be survival benefits to mission drift. In the next chapter, I revisit mission drift as a strategic adaptation.

Mission drift is illustrated amongst HIV NGOs in Toronto, a subset of health-focused LGBT organisations. While not directly affected by same-sex marriage, HIV NGOs are another case of how organisations are affected by a progressive policy development: the winding down of the HIV/AIDS crisis brought about by medical advances and effective policy implementation in HIV prevention and treatment. While not an eradication of HIV, the decline of the HIV/AIDS crisis has advanced a central goal of HIV NGOs since their inception during the height of the epidemic. In the post-crisis context, the nature of HIV prevention and support has shifted to include game-changing preventive drugs like HIV pre-exposure prophylaxis (PrEP) and to address the physical effects of long-term HIV treatment such as premature aging.

Most HIV NGOs are service providers (HIV/AIDS service organisations, or ASOs). These groups engage in HIV prevention activities and offer support for those living with HIV, including support to access basic necessities, government services, and treatment. But in Toronto, HIV NGOs also include advocacy groups, legal organisations, and groups coordinating the overall strategy of the HIV sector.

HIV NGOs are one evolutionary pathway for an LGBT organisation and vice versa. Many HIV service providers in Canada's urban centres originated out of a crisis response by gay communities during the 1980s-1990s HIV/AIDS crisis. As such, many of these community HIV organisations *were* gay organisations. This is especially the case in Toronto, where HIV organisations have been formative sites of LGBT activism and community self-help against a crisis that disproportionately affected the gay community (McCaskell, 2017; Warner, 2002). These organisations were therefore part of the social and political fabric of Toronto's LGBT community. Over time, however, as the reach of HIV extended into other demographic groups, HIV NGO missions drifted away from their primary gay focus to a more mainstream HIV focus. Gay men no longer defined the identity of the organisation but were simply one beneficiary group. At least one HIV NGO leader characterised this shift as the result of "homophobia" (Interview 49). This might be seen as the first initial period of mission drift for HIV organisations.

Having evolved away from their gay origins, HIV organisations may be headed back to their gay roots with the declining HIV/AIDS crisis. Many HIV service providers have recently embraced a 'holistic' approach to preventing HIV which situates HIV risk in the context of societal homophobia, cultural factors, and the extended impact of bullying—all of which can create conditions for people to engage in practices that put them at risk for HIV (Interviews 49, 53, 34). In fact, this new direction for HIV-focused missions overlaps

with EDI, community development, and health activities and services already performed by LGBT organisations. Commenting on this 're-gaying' of some HIV organisations, the leader of an ASO in Toronto said, "it's the circle of life with ASOs right now where they're going back to LGBTQ issues via sexual health because the funding situation has changed for HIV, and ASOs are now reinventing themselves" (Interview 53).

Thus, more than simply an expansion of LGBT-focused programming and an expansion in issues, this return to LGBT roots indicates an organisational transformation via another period of mission drift—one intertwined with the direction of state funding. In fact, I find that mission drift is both the cause and consequence of shifting state funding. While provincial and federal government funding for HIV NGOs had long relied on an anachronistic approach to HIV prevention, treatment, and support (see Chapter 4), state funding has gradually embraced this holistic approach at the urging of HIV organisations (Interview 49). In turn, this encourages HIV organisations to increasingly cultivate a more holistic approach.

Challenging passive interpretations of mission drift amongst NGOs, Toronto's HIV organisations have charted their own path to surviving the declining HIV/AIDS crisis. But they also created the conditions for the restructuring of state funding which now reinforces their evolution in mission "away from HIV" and towards LGBT issues (Interview 53). Similar patterns may be taking place elsewhere amongst HIV organisations. In the China context, for instance, Hildebrandt (2018, 2013) hypothesises that as intergovernmental donors have ended HIV funding to Chinese gay organisations—the product of a 'sufficiently' addressed HIV/AIDS crisis—one possible outcome may be that gay organisations may gain the political space to focus on issues important to gay and lesbian activism.

In the end, I suggest that this convergence with LGBT NGOs makes HIV NGOs more prone to the structural forces affecting the LGBT sector, factors which are both related to and independent of same-sex marriage (see Chapter 4). Fundamentally, for instance, Toronto's HIV NGOs rely on the same donor base as other LGBT organisations—the product of common origins as gay organisations (see Chapter 4). This means that what happens to LGBT giving behaviour and LGBT NGO resource dependence after same-sex marriage has direct implications for the city's HIV NGOs. Toronto's HIV organisations will increasingly compete mission-wise and resource-wise with an already crowded LGBT NGO sector. This demonstrates how progressive policy developments—in this case, same-sex marriage legalisation and a declining public health crisis—can affect a

range of organisations in a common policy domain, redrawing the boundaries of inter-organisational competition by pitting former non-competitors against each other.

The International Arena as a 'New' Frontier to Carry Out Organisational Missions

Given the potential impact of progressive policy shift to contribute to organisational closure and mission drift, organisations may act to pre-empt these possible outcomes. One possible route is turning to other regional contexts as a 'new' frontier for the organisation. With the 'winding down' of domestic legal equality, some EDI organisations in Toronto and Montreal have expanded to the global arena. As I discuss in the next section, other organisations may similarly turn to other issues as a 'new frontier.' Both approaches, however, are fraught with tension.

As many global jurisdictions negotiate LGBT rights, national and provincial-level organisations have entered the international arena to offer their expertise. In addition to providing 'on the ground' work such as diversity and inclusivity trainings, these groups provide policy and advocacy advice on "what to do after same-sex marriage, what to do after decriminalisation" (Interview 69). This work is characterised as a two-way street, offering a Canadian perspective on human rights issues while attaining a global perspective to deepen understanding of increasingly diverse Canadian lived realities. Given Quebec's sociocultural and geopolitical ties to French-speaking countries (Keating, 1999; Feldman & Gardner Feldman, 1984), some Montreal-based groups have characterised their global work as offering a Quebec perspective to LGBT issues in the French-speaking world.

These organisations join a growing number of Western LGBT NGOs engaging in transnational advocacy and becoming involved in local LGBT issues in developing countries. However, as many have pointed out, such transnational advocacy may be problematic on several fronts. On the one hand, the goals and frameworks of Western LGBT NGOs may not be commensurate with local realities (Farmer, 2020). For instance, in more socially conservative regions where deviating from the heterosexual societal norm is not only deemed morally unacceptable but potentially life-threatening, Western LGBT goals of visibility may place LGBT people in greater physical danger (Horne et al., 2009). In collectivist sociocultural contexts, the visibility of individual LGBT identities and the concept of 'coming out' may not make sense (Wong, 2007). LGBT legal protections may be insufficient such that goals like same-sex marriage are not only absent from the organising discourses of local activists, but it may not be desired—existing partnership or familial arrangements may instead afford the greatest latitude for same-sex couples without

disrupting sociocultural conventions (Hildebrandt, 2011; Engebretsen, 2009). Further, the human rights framing of LGBT identities and issues, one embedded in Western development discourses, may turn off local activists and audiences as it may be perceived as a Western imposition and thus potentially a neo-colonial intervention (Seckinelgin, 2018; Farmer, 2020). Indeed, local activist ties to Western LGBT NGOs carry the risk that LGBT identities may be perceived locally as a Western invention.

Thus, the expansion of LGBT organisations into global 'frontiers' is highly contentious, with the potential to create more harm to LGBT livelihoods. Risks to organisational legitimacy are high. With the prevalence of intersectionality discourse and identity politics in the post-marriage context (see Chapter 4), organisations entering global regional contexts face greater scrutiny for how they approach local LGBT identities and lived realities.

Creation of 'New' Issue Areas

> *"[Organisation name anonymised] is a Canadian organisation because we have had a decade to get over marriage equality and realise that there is still lots left to do… Looking at the plight of others has always been a Canadian humanitarian story" (IRI NGO leader, Toronto, Interview 51)*

*

Similar to LGBT NGOs turning to the international arena, the vacuum created by same-sex marriage legalisation enabled LGBT NGOs and actors to turn their attention to the impact they could make globally in the area of immigration and refugee issues (IRI). As an issue area, IRI emerged in full force following same-sex marriage and especially within the last decade. But the legalisation of same-sex marriage not only enabled the spotlight to shine on issues abroad. More broadly, the global policy convergence on same-sex marriage arguably contributed to the rise of problems which IRI NGOs and some EDI groups now respond to.

The *Civil Marriage Act* was part of the early global policy movement on same-sex marriage, preceding similar moves by jurisdictions around the world to recognise same-sex partnerships as a key marker of state progress on human rights. In the process, LGBT visibility has grown, with LGBT rights becoming part of the normative discourse in international development, human rights, and amongst transnational advocacy groups (Bergenfield & Miller, 2014; Seckinelgin, 2018). LGBT rights have even been used as aid conditionality in international development (Seckinelgin, 2018; BBC News Africa, 2014).

In countries persecuting LGBT people such as Uganda, Zimbabwe, and Chechnya, such measures and normative development discourse have produced a backlash, prompting greater criminalisation of and violence against LGBT people (BBC News, 2019; Wan, 2014).

This is where IRI NGOs in the LGBT sector come in. LGBT IRI service provision is present in all three cities but in different forms and to differing degrees. These services may be performed by standalone organisations, LGBT community development NGOs, or by general IRI organisations. This is heavily determined by structural forces and carries implications for the level of IRI provider expertise and service continuity.

For instance, among small community development NGOs in Montreal and Calgary, additional government funds for IRI services is not guaranteed, nor is subject matter or legal expertise. Lack of funding and expert resources means that writing letters of support and preparation for refugee court hearings are not an institutionalised part of the NGOs' service offerings, but contingent upon demand and NGO capacity. Despite this, many LGBT refugees prefer the IRI services offered by LGBT organisations due to LGBT expertise. Consequently, pro bono public lawyers in Montreal will frequently send clients to a Montreal-based LGBT community development NGO. As the NGO's leader explained, the lawyers either:

> don't have time or don't want to take the time to help these women get their stories straight and let them cry about it, and so they refer the women to us for that… Most of the women have never spoken about the violence they suffered, or about being lesbian or bi[sexual], and things like corrective rape. They need to tell their stories a few times before going to court. (Interview 36)

But lack of funding and expertise in a sensitive issue area can carry costs beyond service continuity. In the case of an LGBT community development NGO in Calgary, insufficient financial and expert resources meant that LGBT refugees and newcomers bore the brunt of service shortcomings. This resulted in the organisation eventually offloading in-house IRI services to the city's dedicated newcomer support centre, with the NGO playing a supporting role in future service provision.

In Toronto, I find that the city's unique funding and organisational landscape creates favourable conditions for IRI services to be comparatively well-resourced. In particular, the combination of a dense corporate donor environment and strong norms of community giving enables standalone IRI organisations to emerge and exist, and for resource-intensive crisis response work to be possible in Toronto (see Chapter 4). In

addition to IRI services performed by LGBT community development NGOs, standalone IRI organisations in the city spirit LGBT refugees out of hostile environments to destinations in Canada, the United States, and Western Europe (Interview 51). As with trans-focused organisations, standalone LGBT IRI organisations are a response to the growing number of issues to address in the post-marriage era.

Regional economic and sociocultural forces therefore create the conditions for standalone IRI NGOs to acquire resources, gain prominence, and thereby mobilise regular revenue streams to become sustainable. This is aided by the presence of well-resourced generalist LGBT NGOs who act as key partners in service delivery. In contrast to Montreal and Calgary, these structural conditions allow for standalone IRI organisations and other IRI providers (i.e. community development NGOs offering IRI services) to attract and retain requisite IRI expertise, and to maintain continuity of service provision.

Nevertheless, barriers to IRI organisations exist. As the nature of IRI in Toronto's LGBT sector is also crisis-oriented, primary barriers to the city's IRI organisations are geopolitical and directly related to foreign policy decisions. Crisis response IRI NGOs work with local partners on the ground to get LGBT refugees to safe houses, provide basic necessities, and provide emergency financial assistance until clients can be flown out of the country. As such, political decisions made in response to high-profile humanitarian crises can aid or complicate NGO resettlement efforts.

For instance, in 2017, the federal government embarked on a plan to covertly spirit out dozens of LGBT refugees to escape the 'gay purge' in Chechnya. This fast-tracked the activities of LGBT IRI organisations already working on the case. On the other hand, the Trudeau administration's prioritisation of the Syrian refugee crisis, in which it pledged to settle 25,000 Syrian refugees, has lengthened the wait time for other LGBT refugee cases already in the queue (Murphy, 2017)—a consequence with potentially serious knock-on effects. An IRI NGO leader explained that as a result, "in the last three years, five people in my case load have committed suicide" as their wait time for resettlement was extended (Interview 59). This illustrates the potential dissonance between the activities of IRI NGOs and the political priorities of policymakers—embedded in national and global contexts—even if both parties are working towards the same broader goal of LGBT refugee settlement. It also speaks to the wider ethics and politics of foreign policy decisions made in the humanitarian arena, where decisions to intervene in a humanitarian crisis entail knock-on effects for other vulnerable groups seeking asylum (Gibney, 2004).

But because IRI NGOs resettle refugees in countries other than Canada, the foreign policy decisions of states elsewhere also matter. For instance, the 2017 US ban on refugees from six Muslim-majority countries under President Donald Trump directly affected LGBT refugee cases in Iran, Iraq, and Somalia. As one NGO leader explained, "It is difficult and tough… I am in daily contact with these people. Some have been waiting for three years and then [President] Trump said 'no refugees'… We don't know what will happen next week" (Interview 59).

Strategically Limiting or Expanding Organisational Mandate, Outputs, and Scale

As I illustrated earlier, LGBT NGOs may respond to the evolving LGBT policy domain by taking on additional issues. These constitute shifts in organisational mandate, or the types of issues and identity groups that the NGO addresses under the umbrella of their broad mission (see Table 2.1). While expansion of mandate is the approach taken by some organisations, it does not define the response of all groups. Moreover, the expansion of mandate does not occur in isolation and may have subsequent impact on other dimensions of the mission such as outputs and scale (see Table 2.1). As I show, these impacts can drastically increase the resource intensiveness of the mission and thus resource dependence. Across cases, NGOs grapple with whether and how far to limit the boundaries of their work. This reflects a tension of striking the right balance between available resources, community and sector perception, and the desire to do as much social good as possible.

Table 2.1: Components of the NGO Mission

Mission *The NGO's ultimate social goal(s); usually articulated as a broad vision*	**Mandate** *The issues and identity groups that the NGO seeks to address in its mission*
	Outputs *How the NGO goes about meeting its mandate: the types of activities the organisation engages in*
	Scale *The jurisdictional scale of the mission: local, provincial, national, or international. Or the size of the NGO's operations.*

To be sure, some organisations are explicit about what they can credibly and competently do. In Toronto, community development NGOs purposely restrict their mandate to the more limited 'LGBTQ' umbrella (which excludes intersex and two-spirited

communities). They also restrict their mission scale to local levels, resisting scaling up from provincial to national levels. In Toronto and Calgary, consideration of different types of oppressions and geopolitical conflicts has caused ethnoracial-focused NGOs to grapple with whether they can plausibly be an inclusive space for all ethnoracial groups under their mandates. Without sufficient resources or services in place, NGOs are wary of overpromising on what they can offer and who they can serve. For these groups, attempting to do more than they can comes at the cost of their legitimacy. The pitfalls of biting off more than one can chew is illustrated in Calgary, where a major community development organisation offered services and supports for as many identity groups as possible but without sufficient resources—an approach which backfired as the quality of these offerings was deemed irresponsibly substandard by beneficiaries.

Sector relations are also a consideration. Like groups in other third sectors, I find that LGBT NGOs are territorial about their mission, and the mandate, outputs, and scale of it. Changing or expanding any of these areas risks stepping on the toes of groups already occupying that space. Limiting the service mandate maintains good inter-organisational relations, keeping open potential opportunities for future collaboration. But it also allows better-resourced NGOs to fill the gap, especially if it requires specialist skills. Illustrative of this, in Montreal, EDI organisations deliberated over whether they are equipped to add trans and intersex issues to their mandate, weighing the need to pursue social justice for all with existing capacities, resources, and the need to share work with other organisations to maintain intra-sector relations.

However, other organisations choose not to limit the dimensions of their mission, even extending it. For these groups, expansion of mandate, outputs, and scale is perceived as the socially just method of pursuing NGO missions. For one small IRI organisation in Toronto, expanding its massive scale comes down to relocating as many LGBT refugees as possible. Maintaining it, however, comes at a personal cost. The organisation is virtually a one-man show with its leader personally seeing to each stage of the refugee journey on all 800 open cases—work which takes place outside of his regular day job. But while more people may be helped by pursuing the fullest possible scale of the NGO's mission, burnout may impact NGO sustainability. Attesting to this, the NGO's leader admitted that his humanitarian work comes at a high cost:

> "It has meant sacrificing from my personal life… I can't have time for a relationship… Even dinner and a date is difficult. It's easier to find time to go to Turkey for [the NGO] than it is to have dinner with friends." (Interview 59).

Moreover, expansion of mandate, outputs, and scale may be perceived as not only socially just but responsible given available capacities and resources. They may also be heavily intertwined. This is illustrated by a major EDI organisation in Toronto. To fulfil the organisation's broad mission around social change and eliminating oppression in the post-marriage era, the group expanded its generalist mandate, absorbing issues around LGBT youth, LGBT elders, trans people, intersex people, same-sex partner domestic violence, homophobia and transphobia in schools, inclusion in sports, and international LGBT rights. But producing EDI resources, embedding EDI in school curricula, conducting EDI-related research, and designing programs based on its own research was not enough. It also needed to implement these programs, entailing further expansion in outputs. Rather than wait for another organisation to take on the implementation role, the NGO's leader decided that because they have the funds and capacity, they should be the ones to implement.

This expansion in mandate and outputs mirrors the 'holistic' approach of other large community development and health NGOs in addressing all facets of the social issue. For the EDI NGO, sharing the issues and labour with partners in the sector would come at the risk of an under-resourced organisation taking on the work. Like elsewhere in the nonprofit sector, unstable resources and high staff turnover negatively impact the quality and long-term continuity of service provision (Gronberg, 1991; Selden & Sowa, 2015). Already-vulnerable beneficiaries would bear the brunt of interruptions in service provision. Ultimately, the NGO reasoned that the societal benefit of expanding its outputs and mandate—doing it all—outweighed the cost of strained intra-sectoral relations with its NGO peers.

However, taking on the implementation role, this expansion in outputs resulted in further expansion to mission scale: the national-level advocacy NGO moved into direct service provision, pitting it in competition with local service providers in Toronto and service providers across the country. Expectedly, the move was poorly received by some in the sector and elsewhere in Canada. For instance, the leader of a Montreal-based provincial-level EDI organisation commented that the NGO in question was "like Pac-Man," encroaching on organisational funding and territory with a seeming disregard for whether affected organisations have long histories of working on those issues (Interview 24).

Evidently, expansion of mandate, outputs, and scale comes at the cost of interorganisational relations in the sector, potentially compromising valuable sources of

expertise and communication channels to avoid service duplication. It also comes at a heavy financial cost. As mentioned in the previous chapter, the funding constraints of geographic scale make scale-based expansion of NGO missions enormously expensive and challenging in Canada. Moreover, providing sustainable 'holistic' programs addressing all aspects of the issue and appealing to as many issues and groups as possible is resource intensive. Requiring specific issue expertise, additional human resources, funding, and a potential expansion in organisational infrastructure to accommodate new programs, the organisation becomes more resource dependent. As the leader of a major community development NGO observed, "You can't really provide an amazing service without being given $10 million a year" (Interview 44). Further, as noted in Chapter 4, increased resource dependence is made more problematic by finite economic resources, existing funding constraints, and changing donor behaviour, all of which hamper resource mobilisation.

Whether motivated by a social ethic of helping as many people as possible, or territorialism and careerism as some NGO leaders have suggested, the organisational impulse to do it all mandate-, outputs-, and scale-wise is a response by some to the growing number of issues to address and groups to serve. But, as I contend, it may also be a pre-emptive response to a greater risk: the post-marriage expansion of the LGBT sector. As alluded to earlier in this chapter with the formation of specialist organisations, the risk of members leaving with their issue expertise to start their own NGO is high. Thus, to prevent the loss of human and economic resources, and the rise of competitors for those resources, LGBT NGOs may choose to expand large mandates. However, in attempting to do as much social good as possible and in the interests of organisational sustainability, mission pursuit is made more challenging.

Expansions to mission mandate, outputs, and scale are only one outcome of the impact of progressive policy shift on the organisational mission. As I have shown in this section, progressive policy change can also result in mission drift, as well as the 'emergence' of new regional frontiers and issue areas. These impacts on the organisational mission are further affected by local and global societal, state, and market forces.

The Impact of Policy Shift on Organisational Capacity

> *"In the future, heterosexual people will be more important to carry the [LGBT] flag." (LGBT community development NGO leader, Montreal, Interview 38)*

*

In the previous sections, I showed how progressive policy change affects the conditions for LGBT NGO persistence through impacts on organisational development and the organisational mission. But it moreover affects LGBT NGOs by impacting organisational capacity. This section demonstrates how same-sex marriage legalisation has impacted the availability and sustainability of organisational members (paid or unpaid) and volunteers. In the next chapter, I return to the issue of organisational capacity in the post-marriage context and how small NGOs have adapted to it.

Policy Shift Affects Sustainability of Human Resources

Demographic changes related to same-sex marriage legalisation can present immediate and longer-term impacts on the sustainability of organisational members and volunteers. On the one hand, the resolution of same-sex marriage gave LGB people the license to move on with their lives. This is most apparent among EDI-focused groups. With the 'pinnacle' right attained, domestic issues of LGBT rights and equality are seemingly less pressing, especially for non-racialised, older, and/or middle and upper class LGBT people. As such, it becomes easier for NGO involvement to be more casual over time as many LGB people rest on the "laurels" of long-term same-sex marriage (Interview 67). This makes the pool of available NGO actors less reliable and less sustainable, affecting capacity for mission pursuit.

But perhaps more importantly, same-sex marriage affected the LGBT life course by widening the opportunity for and thus normalising LGBT family formation. While having families was a reality for same-sex couples long before they could legally marry, marriage arguably opened the door to making family formation easier and to be seen as not only a more viable option, but a more desirable one. The effect of marriage has been to push LGBT parenthood from the margins to the mainstream (NeJaime, 2016). While same-sex adoption had been legal in nine provinces and territories before same-sex marriage was federally legalised, marriage offered social legitimacy and the security of financial and legal benefits. Arguably, the opportunity to see LGBT parenthood as an attainable, desirable option—the next 'natural' step in the life course for LGBT people—thus widened. This demographic shift is reflected in the decade after the *Civil Marriage Act*. Between 2006 and 2016, the number of married same-sex couples increased by more than 226%! (Statistics Canada, 2017a). On top of this, more same-sex couples are raising children. In 2016, 12% of same-sex couples were living with children, a 15-year increase

from 2001 of almost 50% (Statistics Canada, 2017a). With more same-sex couples marrying and raising children, this affects the pool of people available to do the work of LGBT NGOs. This may particularly be the case in Toronto and Calgary, where the regional significance of marriage is high and its role in LGBT family formation potentially higher (Statistics Canada, 2016a).

Thus, in Toronto and Calgary, LGBT organisations have grappled with the sustainability of members and volunteers shortly after and long after same-sex marriage. Following the 2005 *Civil Marriage Act*, large and small rights-focused EDI organisations in Toronto collapsed. For NGOs that had advocated for and against same-sex marriage, the battle over this 'pinnacle' right was over, marking the end of a long road. As I discussed earlier in this chapter, with the primary driving force for EDI activities gone, exhausted members, volunteers, donors, and supporters had moved on, causing organisations to contemplate folding. Long after same-sex marriage, I find that the continuity of small EDI NGOs is tenuous, illustrating the temporal nature of grassroots organisations but also the fact that long after same-sex marriage, EDI activities are no longer as pressing as they were when rights were at stake. Indeed, the capacity for mission pursuit is intermittent as members and volunteers are preoccupied with careers and raising families. What this means for many LGBT organisations is a success paradox: the progressive policy change that these groups helped bring about may impede the sustainable human capacity of these very organisations, making continued mission pursuit and thus survival difficult.

Young People as Resources for Organisational Renewal

> *"Francophone groups are still stuck in the GLB [gay, lesbian, bisexual] framework. Because of this, a lot of young activists have instead gone off and done their own thing rather than be in these organisations that have this more rigid GLB approach. It's also difficult because of language where French is so gendered." (LGBT EDI NGO leader, Montreal, Interview 27).*

*

While policy shift has affected the pool of sustainable human resources, it has also created possibilities for organisational capacity. Across cases, young LGBT people (under 35 years old) are turning up to bring the work of their predecessors into the contemporary era. Abreast of frequent developments in LGBT issues, vocabulary, and politics, this demographic is an important resource for keeping NGOs current, aiding in NGO persistence as the policy domain evolves. In other words, as NGOs negotiate a post-

marriage context of expanding issues and groups, young people have become resources for organisational renewal and thus continued persistence.

Moreover, young people are a resource in NGO formation, establishing new LGBT organisations to fill gaps in EDI, community development, and arts and culture. In Montreal, approximately 60% of interviewed organisations were headed by young people, far outnumbering those in Calgary and Toronto. The flood of young people at the helm of many long-established LGBT NGOs has breathed new life into Montreal's LGBT sector. Collaboration and the expectation for it is greater, with greater attention to issues of race/ethnicity and representation, greater emphasis on intersectional approaches in LGBT service provision and advocacy, and more willingness to tap into revenue sources beyond the traditional lifeblood of government funding. As such, many EDI and community development NGOs are seeking corporate funding and cultivating philanthropy strategies for the first time, shoring up organisational financial sustainability.

Yet, in a sector where many established NGOs are still run or guided by their activist founders, these new approaches face resistance. Young leaders in Montreal frequently criticised their more senior sector counterparts for not including certain identity groups under their service mandate and not adopting intersectionality in their approach to LGBT issues. Differences in approach may affect within-sector relations. Further, when young leaders seek to take existing NGOs in a new direction, they may be welcomed by the community but face resistance from members of the organisation unwelcoming of change. As a major EDI and health organisation in Montreal demonstrates, resistance from within the organisation may make these changes unsustainable. Fundraising campaigns initiated by the NGO's new leader faced opposition from board members aligned with a French Catholic sociocultural tradition of not "ask[ing] for money," norms embedded in the organisation under its predecessor leader (Interview 28). Vestiges of the previous organisational culture may therefore hinder new approaches to how the NGO's mission is pursued (Lewis et al., 2003; Stinchcombe, 1965).

The Threat of Mainstream Providers to Existing LGBT NGO Capacity

But while policy progress can create opportunities for capacity, as demonstrated with young people, it may also produce unintended consequences for NGO capacity. This is illustrated in the example of mainstream service providers. As LGBT issues have become more normalised and LGBT people more visible in society, mainstream service providers such as health and community development organisations are increasingly willing to adapt

their services to fit LGBT needs. This is expected with and perhaps even the result of increased LGBT diversity and inclusion training in workplaces and amongst mainstream providers—training provided and advocated for by LGBT organisations. While beneficial to the provision of LGBT services, mainstream providers may present new competition for resources in the LGBT policy domain. Indeed, it is their potential threat to the existing capacity of LGBT NGOs which may keep them on the side lines of LGBT service provision. This is most prevalent in Toronto.

Toronto's mainstream providers often host LGBT programming offered by LGBT organisations. In doing so, they leverage the expertise of LGBT organisations by outsourcing LGBT service provision. This often occurs when mainstream providers are located in suburban areas without local LGBT NGOs, but there is a desire to offer LGBT-oriented services. Mainstream providers are then able to fill a gap in their own service provision and LGBT NGOs are able to reach communities beyond their core client population. Perhaps less commonly, mainstream providers may offer their own in-house-developed LGBT programs or absorb long-established LGBT programs from other organisations. But this does not reflect a lack of desire to offer in-house LGBT services. Mainstream organisations, even in more socially conservative suburban areas of Toronto, are in fact willing and eager to develop their own LGBT services.

Rather, it is scepticism of the 'readiness' of mainstream organisations to deliver LGBT services which keeps these services in the domain of LGBT organisations (Interview 51). As one LGBT NGO leader put it, "You can put a pride flag on your office door at the community centre, but it doesn't change the fact that the surrounding area is still pretty socially conservative" (Interview 50). Indeed, this criticism is less about whether the service providers themselves are qualified, but whether their community is ready—and perhaps whether LGBT organisations are prepared for the implications.

From a cost-benefit standpoint, it would be cheaper and in the interests of service continuity for both parties if mainstream providers offered their own in-house LGBT services rather than relying on the fluctuating capacity of a third party. However, this would mean that LGBT NGOs would then face new competition from mainstream providers for funding, expertise, and volunteers. With the emergence of new LGBT organisations and expanding organisations (as earlier noted), LGBT providers already face growing competition for finite resources. Perhaps as a result, LGBT NGO leaders tend to praise the willingness of mainstream providers to offer LGBT services, but simultaneously

use these instances as evidence that LGBT NGOs must continue to exist. At stake is the preservation of LGBT NGO capacities.

This demonstrates the unintended impact of progressive policy shift on organisations within a common policy domain, where policy shift has the potential to redraw the boundaries of competition: previously non-competitive in relation to each other, mainstream providers now present unwelcome competition to LGBT service providers the more their activities overlap (Baum & Singh, 1994). Yet, this development is the result of the policy progress brought about by these same LGBT service providers. To preserve scarce human and financial resources, LGBT service providers exhibit territoriality around their work, emulating behaviour seen elsewhere in organisational ecology studies when common resources are threatened (Hannan & Freeman, 1977).

Identity Politics Configures NGO Actor Identity as a Measure of Organisational Legitimacy

Policy progress may also create unintended consequences for capacity by affecting organisational, sectoral, and community expectations around who 'should' engage in LGBT service provision and advocacy. With the growing ubiquity of intersectional approaches and the rise of contemporary identity politics, same-sex marriage opened the door for existing representational disparities in the LGBT sector to be more closely scrutinised. Consequently, there is a heightened preoccupation with the sexual, gender, racial, and socioeconomic identity of NGO actors. I find that NGO actor identity has become a measure of organisational legitimacy to credibly work on the issues under its mandate and serve its communities. This is particularly the case where these issues and communities are related to marginalised and underrepresented groups in the LGBT community.

In Toronto and Calgary, grassroots organisations focused on youth, trans people, and ethnoracial minorities intentionally pursue a 'for community, by community' approach. This entails that those who comprise the NGO should reflect the beneficiary population. As one NGO leader explained, recruiting board members and volunteers who are "racialised, trans, and who are not in university" is prioritised and that by contrast "the MSW [Masters of Social Work] students go in a 'maybe pile'" (Interview 48). They elaborated that "these folks bring a different energy" but that this hiring practice ultimately reflects "the type of organisation" they are and "enhances the credibility of [the NGO] with grassroots organisations" (Interview 48). Indeed, the desire to correct the representational

imbalance in the sector has swung to the other extreme, where NGO actor identity is of primary importance. Organisational credibility rests upon who comprises the organisation, overshadowing organisational capacities to pursue the NGO's mission.

More broadly, these concerns speak to the concept of 'comparative advantage' (Billis & Glennerster, 1998) in the third sector, specifically with respect to NGOs serving minority groups. At issue is whether shared minority identity between provider and beneficiary affords the NGO a comparative advantage in serving this demographic—and if it does, as grassroots LGBT organisations suggest, how far it exists and how it might impact capacity and sustainability. Chambré (1999) observes that despite little empirical support, this assumption of comparative advantage underlies how personal experience elevates individuals to experts in sensitive issue areas within complex arenas of NGO service provision and advocacy. While this approach may result in an organisation that demographically reflects its beneficiaries, it may come at the cost of the capacity required to capably and sustainably pursue the NGO's mission.

Barriers to NGO Participation and Sustainability of Organisational Capacity

In a similar vein, LGBT organisations are keen to correct the underrepresentation of women in leadership and board positions. There is the expectation that women 'should' be in these roles, but their underrepresentation remains. But while there is an expectation of who 'should' comprise the organisation, demographic changes spawned by this very policy progress may preclude this.

I found that in some cases, women have been present and even integral to founding LGBT NGO leadership but disappeared from these roles over time (Interview 58). This speaks to broader trends in the Canadian nonprofit sector. Women make up to 75% of the nonprofit sector labour force but based on their employment share in the sector, they are underrepresented in senior leadership and stewardship positions (i.e. board positions) while men are overrepresented (ONN, 2018). Within the LGBT sector, NGO leaders pointed to possible reasons for the lack of women in leadership and stewardship positions, related and unrelated to same-sex marriage. Triangulating these empirical findings with scholarly findings in the management, psychology, and education literatures, I outline these here as hypotheses that might explain gender barriers to NGO participation in the context of long-term same-sex marriage legalisation. In turn, these hypotheses may be applicable to understanding gender disparities in leadership positions in the Canadian nonprofit sector.

First, the lack of women in prominent leadership and stewardship positions, a problem beyond the LGBT sector, can be explained by barriers to entering and remaining in these roles. Studies of large firms show that tendencies in hiring practices disadvantage women and ethnoracial minorities: firms tend to be *homophilous* in hiring practice—that is, hiring from their social networks and people with similar gender, race, and ethnicity to those already in the organisation (Edo et al., 2019; Jacquemet & Yannelis, 2012; Gorman, 2005; McPherson et al., 2001). This is evident in the LGBT sector, where many LGBT NGOs and spaces continue to be male-dominated and white. As such, organisational homophily has been a persistent problem for the sector's representation of women, and especially women of ethnoracial backgrounds, reproducing disparities in gender and ethnoracial representation. This is a problem generally but especially for EDI and community development NGOs affiliated with specific industries, such as business, where women are historically underrepresented (see Ng & Sears, 2017; Coleman, 2002). The lack of women in these NGO spaces may further discourage other women from showing up, producing a path dependent pattern.

Second, following the legalisation of same-sex marriage, gender differences in the LGBT life course may affect NGO participation in leadership and stewardship positions. A member of a community funder observed that "maybe it's a thing about lesbian women 'retreating' once they have families, or volunteering with family stuff now that they have families" (Interview 58). Psychology literature (Gameiro et al., 2010; Kurdek & Schmitt, 1986) attests to the phenomenon of the retreat into a familial space upon parenthood. With women likelier to form families in the LGBT community (Statistics Canada, 2017a), women are therefore less likely to be present in leadership and stewardship roles in the LGBT NGO sector, especially in an underpaid or unpaid capacity. With more queer women raising families long after same-sex marriage, this may mean that fewer women choose to enter or remain in the LGBT NGO sector in a career or volunteer capacity.

Thirdly, long after same-sex marriage, there may not be the desire to be involved in LGBT NGOs. As the leader of a community development NGO explained, the fact that not all LGBT people choose to come out or participate on LGBT committees in their workplaces cannot fully be explained by an unwelcome climate. Rather, "it's not the responsibility of LGBTs to raise the flag all the time" (Interview 38). When social and political visibility is pervasive and normalised, LGBT people may simply want to move on with their lives, assimilating into mainstream society. This assimilationist tendency is shown elsewhere among young LGBT people in suburban locales, where the normalisation

and visibility of LGBT identities coupled with legal progress has reduced the need to be involved in LGBT organisations (Edwards & Grippe, 2019). Coupled with homophilous hiring/appointing tendencies and gender differences in family formation, I suggest that mainstream assimilation with long-term social progress may have the unintended effect of exacerbating existing inequities in the representation of women in leadership and stewardship positions in LGBT NGOs.

Thus, while there is greater attention and desire to correct the underrepresentation of marginalised groups in the LGBT sector, social and demographic developments following long-term same-sex marriage may make this more challenging. Indeed, this shows that advances in LGBT equality and a greater discursive emphasis on diversity are not necessarily reflected in the composition of LGBT NGOs. Presenting counterintuitive findings, this adds to our understanding of the complex barriers facing diverse representation in the LGBT NGO sector, illustrating the role of policy progress in shaping organisational capacity. Insofar as diverse representation is one measure of organisational credibility, the capacity to be perceived by beneficiaries, the sector, and the community as legitimate NGO actors in their issue area may be impacted. Simultaneously, however, going too far in satisfying preoccupations with who 'should'—indeed, who has the 'right' to—engage in LGBT service provision and advocacy may interfere with the required organisational capacity to pursue NGO missions.

Conclusion: Progressive Policy Shift Affects the Organisation to Produce Greater Resource Dependencies

In this chapter, I have demonstrated how a policy change which advances organisational goals can subsequently affect the sustainability of those very organisations. I have shown how such policy progress can affect organisational development, adding to our understanding of the role of policy shift in organisational life cycles. Same-sex marriage legalisation caused many organisations, including both proponents and opponents of marriage, to face the possibility of closure. But as the case of Montreal's EDI groups show, this was not a necessary outcome, but one embedded in regional societal and state structures. By opening up the space for community diversity and identity discourses to evolve, same-sex marriage also laid the groundwork for specialist organisations to form and generalist organisations to expand their mandates.

Further, I illustrated how policy shift affects organisational persistence by focusing on impacts on the mission. As the policy problems evolve and the direction of funding

changes, organisations may drift from their originally stated mission. But, challenging interpretations of passivity in dominant conceptualisations of mission drift, I find that they may also be architects of structural changes which encourage mission drift. Mission drift may present benefits to survival but may also complicate it. Elsewhere, LGBT NGOs have exported their mission to the global arena, a contentious development highlighting the dangers of applying Western liberal LGBT discourses to non-Western contexts. Relatedly, in responding to global humanitarian crises, regional structures of corporate and individual giving shape organisational capacities for new issue areas such as IRI. In this context of new issues and groups to address and serve, the size and shape of organisational missions reflect strategic decisions—though not necessarily in the interests of sustainability—about balancing resources, community and sector perception, and the social imperative to help others.

Lastly, I showed how progressive policy change can affect organisational capacity. Long after same-sex marriage, small organisations navigate the instability of human resources, the product of changes to the LGBT life course and changes to citizenship. But policy progress also creates opportunities for organisational capacity, as young people have become key resources for NGO renewal. Yet, there is also the potential for unintended consequences, as the post-marriage environment has given rise to new competitors in the LGBT policy domain, placing added pressure on already fierce competition for resources. With increased attention to the politics of difference, there is the desire to correct the underrepresentation of marginalised groups in LGBT NGOs. But heightened emphasis on NGO actor identity as a measure of organisational legitimacy may negatively affect capacity. Moreover, the desire to correct the underrepresentation of women may be hampered by persistent challenges related to the broader societal impact of policy progress.

My findings show how progressive policy shift can affect the conditions for sustainability for a range of organisations in a policy domain, redrawing boundaries of competition and increasing resource dependencies. Same-sex marriage opened the door to an expanding community diversity and greater attentiveness to within-group difference. In this context, LGBT service provision and advocacy are shown to be more resource intensive, increasingly prone to the structural forces shaping the possibilities for resource availability and resource mobilisation discussed in Chapter 4. These impacts on organisational development, mission, and capacity add to our understanding of how same-sex marriage has affected LGBT politics, communities, and the organisations key to these (Ball, 2019; Rayside, 2019; Bernstein, 2015, 2018; Manning, 2017; Browne & Nash,

2014). As I find, policy progress has become a problem of organisational resource dependence. In the next chapter, I examine how LGBT organisations exercise their agency to adapt to the pressures created by sociocultural, political, and economic structures and same-sex marriage legalisation. Returning to the impact of policy progress on organisational capacity, I introduce a new concept to understand how small organisations have managed funding and capacity-related constraints.

6. Organisational Adaptation, Transformation, and Survival

"You can't just budget for Chechen refugees to come here… Philanthropy enables [us] to genuinely respond to community need… Philanthropy enables a bubble of nimbleness." (LGBT Community Development NGO Executive, Toronto, Interview 47).

*

"How big do we want to get? …We usually don't do any publicity because we're afraid the money won't be there for the trainings." (LGBT EDI NGO Leader, Montreal, Interview 24).

*

"We survive. That is the problem. We are in a survival game. And you go back to basic emotions." (Queer Women's EDI NGO Leader, Montreal, Interview 32).

*

So far in this thesis, I have shown what happens to organisational survival when a policy shift occurs which advances organisational goals. In Chapter 4, I illustrated how societal, state, and market structures—independent of and in conjunction with policy progress—shape possibilities for resource availability and resource mobilisation long after same-sex marriage legalisation. I found that policy progress may produce changes in sociocultural, political, and economic forces to affect NGO sustainability. In Chapter 5, I demonstrated how progressive policy shift itself can affect the organisation through impacts on organisational development, mission, and capacity. Illustrating my conceptual framework of how progressive policy shift affects organisations within a policy domain (see Chapter 2), same-sex marriage legalisation has heightened resource dependencies, exacerbating the impact of societal, state, and market structures on the organisation.

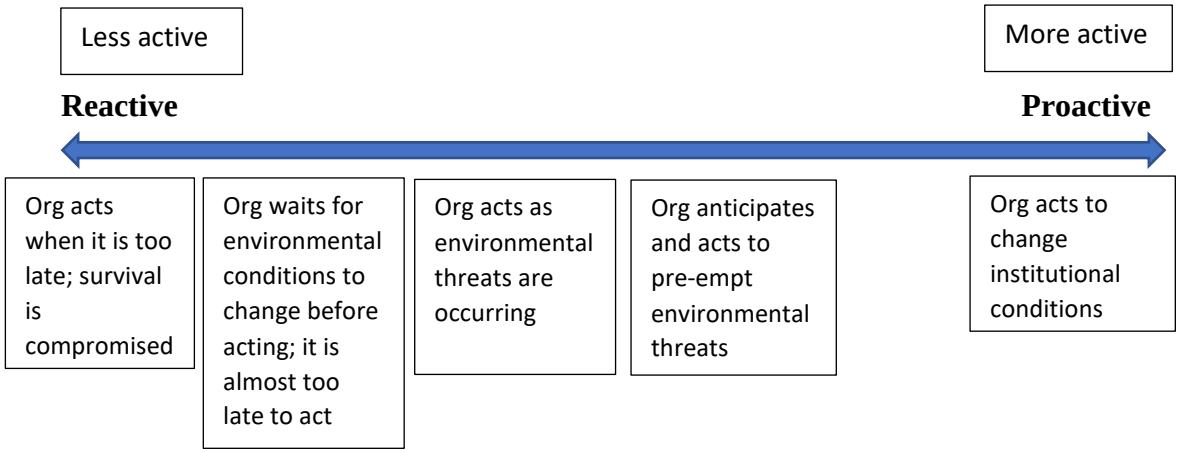
Thus far, I have shown how LGBT NGOs have been acted upon. But they also have the capacity to exercise agency to adapt in order to survive these pressures. As I discussed in Chapter 2, organisations are not simply recipients of structural, organisational, and policy forces. They have the capacity to reshape these influences within the constraints of the environment (Child, 1972). Organisational actors can interpret, manipulate, and change the limits and opportunities surrounding them by choosing to adapt to the situation, shape it, or avoid it (Batley & Rose, 2011). Adaptation reflects a fundamental degree of

choice that organisations have in acting upon the environment in which they operate (Oliver, 1991).

In the previous chapters, I demonstrated a political economy of structural forces, progressive policy shift, and organisational factors. In this chapter, I demonstrate the final aspect of this analytical framework (see Chapter 2) by examining the adaptations that LGBT organisations make to navigate structural and organisational pressures after same-sex marriage. But while adaptations are made in the interests of organisational persistence, they are not a fix-all. They may strengthen the capacity to survive, result in organisational weaknesses which make it more difficult to persist, or produce a combination of both outcomes. As I illustrate, the benefits and costs of adaptation play out across the short and long term. In shifting the dynamics of survival, adaptations may present new challenges to navigate.

To emphasise, agency is crucial to how I approach adaptation and survival in this chapter and in this thesis. As I illustrate in this chapter, when organisations adapt or respond to environmental pressures, this is not necessarily a reflection of passive behaviour dictated by the environment. Adaptations can be reactive or proactive in responding to environmental threats. Reactive adaptations respond to environmental changes as they are happening or after they have happened (effectively waiting to act until conditions change). Proactive adaptations anticipate the environmental pressures and act to circumvent them (see Figure 6.1). At the furthest end of the adaptation continuum, a reactive adaptation is one undertaken when the organisation does not act until it is too late, resulting in organisational survival being compromised. At the opposite furthest end of the adaptation continuum, a proactive adaptation seeks to shift the basic functions, goals, and operations of existing institutions, effectively changing the rules of the game. Proactive adaptations exist at the more active end of the adaptation continuum while reactive adaptations exist at the less active end of adaptation. Throughout this chapter, I present examples of both proactive and reactive adaptations. Indeed, as environmental threats are constant and evolving and there is an iterative dynamic between the organisation and its environment, many adaptations in this chapter contain elements of both proactiveness and reactiveness. In this cycle of constant interaction between the organisation and its environment, the organisation may be responding proactively to one factor and reactively to another.

Figure 6.1: A Continuum of Activeness in Organisational Adaptation



Regardless of whether the organisation is responding reactively or proactively to the environmental influence, the capacity to choose and to act—even within the constraints of the environment—reflects agency in action. As I noted in Chapter 2, this is an integral theoretical and conceptual assumption to adaptation in this thesis. My discussion of adaptation in this chapter both directly and indirectly invokes the agency of the organisation and thereby the agency of individuals within the organisation who impact organisational action, adaptation, and survival. That is, when I discuss adaptation—for instance, in the context of organisations undertaking proactive or reactive adaptations—I am also discussing agency.

As noted in Chapter 3, due to my analytical focus at the organisational, population, and policy domain level, as well as methodological limitations, my direct discussion of agency focuses on organisational agency. But this does not mean that in discussing organisational agency, I am ignoring individual agency. As I noted in Chapter 2, my discussion of organisational agency (either directly or via adaptation) assumes that organisational agency is shaped by factors within the organisational unit, including the agency of individual actors, power and politics, and decision-making processes. That is, individuals within the organisation impact upon the organisation's direction, strategy, adaptation, and survival, reflecting the influence of individual agency upon organisational agency. Of course, power imbalances and competing interests and priorities mean that organisational agency does not necessarily reflect the agency of all those within the organisation. Ultimately, however, organisational agency is intertwined with individual

agency, and this is assumed in my direct discussions of agency and in my discussions of adaptation.

In this chapter, I first examine how LGBT organisations may make adaptations to their mission when the central issue around which their mission revolves has been 'resolved.' I then illustrate how adaptations can be made to the structure of the organisation, features such as its name and language of operations, and how the NGO frames its work. While made to attract funding and to remain relevant, these outcomes are not guaranteed and may affect possibilities for NGO collaboration within the LGBT sector. Next, I show how LGBT organisations have adapted their revenue streams to circumvent constraints in government funding and narrowing opportunities for corporate funding. While philanthropy presents a new vital source of funding, demographic shifts present new challenges to tapping into the market of future donors. In the subsequent section, I show how NGOs may adapt their regular operational levels to avoid overextending by engaging in organisational inertia: treating growth as temporal, resisting it, or placing bounds on meeting beneficiary needs. I introduce a new concept of organisational hibernation to describe a type of adaptive behaviour undertaken to maintain continuity during periods of resource scarcity and organisational constraints—challenges posed by structural forces and policy progress. I summarise these types of adaptations in Table 6.1.

Finally, I demonstrate how adaptive behaviour may result in regressive outcomes for the organisation. Maladaptive behaviour may present short-term or long-term consequences for organisational livelihoods which may hamper persistence, contribute to visible decline, or make continued persistence nearly impossible. To emphasise, due to the iterative dynamic between the organisation and its environment, many adaptations and maladaptations in this chapter reflect both proactive and reactive behaviour. That is, in any adaptation or maladaptation, the organisation may be responding proactively to one factor and reactively to another.

Ultimately, I contend that the NGO quest to continually fund an ever-expanding and more complex project of LGBT equality may in and of itself be maladaptive. In the post-marriage political economy of structural forces, progressive policy shift, organisational factors, and adaptation, engaging in this 'funding game'—a repetitive cycle of short-term funding that heavily determines survival—to do social good may have detrimental impact upon the LGBT sector. These adaptations and maladaptations show how policy progress affects a range of organisations in a policy domain in different ways—

and how organisations strategically respond in turn to navigate the structural and organisational forces of a changing policy domain.

Adaptations to Organisational Mission

To adapt to structural and organisational pressures related to policy progress, some NGOs in the LGBT sector have adapted aspects of their mission. In Chapter 5, I discussed the impact of progressive policy shift on dimensions of the organisational mission. In this section, I revisit these issues to highlight the role of agency in processes such as mission drift and shifts to mission mandate and scale. In doing so, I reconfigure them as strategic adaptations which organisations may undertake to withstand the pressures arising from progressive policy shift and structural forces. This offers the opportunity to view mission drift and shifts to mission mandate and scale in a more complex light, underscoring their potential benefits in addition to the challenges to organisational persistence. This complicates normative assumptions in the literature that these processes are necessarily always counterproductive for the organisation.

Mission Drift and Adaptations to Mission Mandate and Scale

As I noted in Chapter 5, mission drift occurs when organisations behave in ways which do not appear to align with their image or values (Grimes et al., 2019). This includes neglecting pursuit of the stated major goals in favour of those which aid in maintaining the organisation, or deviating from these stated major goals to pursue a different ultimate goal altogether (Warner & Havens, 1968; Jones, 2007). In much of the literature on mission drift, there is an assumption that there must be continuity between the organisational identity and its actions and strategies, or the organisation risks being perceived as inauthentic in its actions (Grimes et al., 2019). As such, mission drift is often viewed as normatively 'bad' for the organisation, and something to avoid (Conforth, 2014; Jones, 2007; Rothschild et al., 2016). However, as some scholars have noted, mission drift may present benefits under certain conditions as it may help the organisation appear more responsive to external pressures and may aid in survival (Grimes et al., 2019; Suchman, 1995). Highlighting the agency of organisations, my findings here speak to this conceptualisation of mission drift as a strategic adaptation that may be undertaken when continued persistence is at stake.

In a prime example, same-sex marriage legalisation fulfilled prominent goals of LGBT rights-focused organisations in Ontario and Quebec. Facing death from goal attainment, depleted funds, and exhausted organisational membership, survival lay in a shift in mission focus. Surviving organisations have since moved to a broader EDI focus, including a more recent focus on trans issues. As mentioned in Chapter 5, in Toronto, a major national organisation moved from litigation-based same-sex marriage activism to a new focus on education as a route to achieving LGBT lived equality. As the political economic tide of the New Public Management swept across Canadian governance regimes, the shift in focus was timely. In practice, its new education focus meant producing its own research on homophobia and transphobia in Canadian schools, upon which it would then develop curriculum programs. In other words, the NGO was not only producing evidence-based education programs, but producing the type of evidence that government agencies themselves required to inform policy decisions and interventions (Head, 2008; Sanderson, 2002; Seckinelgin, 2010). Whether by accident or design, the mission drift to research ensured the NGO would remain of instrumental utility to multiple levels of government. Aided by the legitimacy it drew from its previous litigation activism, the group moved from operating as a single-issue organisation to a massive multi-issue national organisation. Importantly, this adaptation to focus enabled it to survive the policy progress it helped bring about. Notably, however, strategic mission drift was effective in this case because of organisational history and favourable political and economic conditions that sustained the relevance of its new mission focus.

In Montreal, the province's former rights-focused organisation has shifted from strictly lobbying on LGBT rights to lobbying and policy advisory on LGBT social equality. Within Quebec's corporatist governing structure, it has become a fixture in interest representation on behalf of the province's LGBT organisations. While continued persistence in the immediate wake of same-sex marriage legalisation was not at risk due to the buffering effect of the state (see Chapter 5), mission drift enabled the group to become a key advisor to a provincial government committed to a policy agenda of LGBT social equality. Reflecting a more active adaptation (albeit after same-sex marriage conditions had already changed), the group anticipated the opportunity to continue advocacy beyond same-sex marriage and adapted proactively. In doing so, it has influenced the state's policymaking and political agenda across policy portfolios, helping to guide the evolution of state institutions and governing goals in favour of LGBT social equality.

The NGO has also scaled up, from being formerly Montreal-dominant to provincial in scale. Yet, for this organisation and its national counterpart, mission drift has entailed an expansion in mandate (see Chapter 5). Moving from a single issue to multiple issues across a broad scale has additionally meant more bases to cover. This requires additional resources to develop issue-specific expertise and greater NGO capacity to pursue a broader mission. Prolonging immediate persistence has become a problem of resource dependence and, in turn, long-term persistence.

In both cities, I find that HIV NGOs have similarly adapted their focus as the HIV/AIDS crisis has declined. Survival is to be found in proactively "moving away from HIV" (Interview 49). As mentioned in Chapter 5, in anticipation of a continuing decline in the HIV/AIDS crisis, HIV NGOs have proactively moved towards a holistic health approach, addressing a broad spectrum of social, mental, and physical health factors to reduce the risks for HIV infection. At the urging of these groups, state funding has gradually followed suit as part of a paradigmatic shift in HIV treatment and prevention in federal and provincial funding to reflect a modern response to HIV. To continue to appeal to these new government funding priorities, at least two ASOs aim to transition to a sexual health centre—one a generalist ASO intending to become a gay men's sexual health centre, and the other a small ethnospecific ASO seeking to become a local and potentially national health hub for their demographic minority.

But while this government shift in HIV strategy was sought and welcomed by HIV organisations in Toronto and Montreal—indeed, the result of a declining public health crisis that these groups helped to bring about—it has also presented new challenges. Similar to formerly same-sex marriage-focused NGOs, the shift in mission and mandate is more resource-intensive, requiring new types of expertise and capacities. The shift is one that smaller ASOs may not be able to afford. Moreover, the move towards holistic health takes the HIV issue area closer to community development issue areas, overlapping with and competing with LGBT NGOs. As noted in Chapter 5, this presents added competition for an increasingly common pool of funding. In other words, the adaptation of HIV NGOs to the evolution of the HIV crisis—to the organisational and structural pressures resulting from this—affects the sustainability of other LGBT organisations in the wider environment.

Adapting to the Challenges of Expanded Scale: Blurring Jurisdictional Levels

To adapt to the problems of too wide a mandate and scale, provincial- and national-level organisations have adapted jurisdictional focus. As I discussed in Chapter 4, funding and geographic barriers inhibit the capacity of provincially and nationally mandated NGOs to be truly representational in scale (see also Smith, 2008). Going beyond the city in which the NGO is based is financially prohibitive. Anchored in their municipality, LGBT NGOs have instead adapted their scale to enable mission pursuit by blurring jurisdictional level across issue areas. Reactively compensating for funding and scalar constraints (and anticipating and pre-empting future ones), these organisations speak to the issues of their local community while maintaining some presence at their mandated scale. This is seen in EDI and community development, where provincial-level organisations speak to local and federal issues, and national-level organisations meet local community needs and engage in issues under provincial jurisdiction (see Chapter 5). Jurisdictional blurriness might be interpreted as a variant of 'scale jumping' deployed by social movement agents for the purposes of advancing their agendas (Leitner et al., 2008; Adams, 1996). But rather than pursued to leverage political resources available at other scales to expand their power (Leitner et al., 2008), LGBT NGOs jump scale and blur jurisdictional boundaries as a means to manage their missions within the bounds of their resource constraints.

But I find that there are also practical rationales for blurred jurisdictional boundaries: first, while issues can be politically separated by jurisdiction, they are mapped onto each other in everyday life. For example, a national-level organisation located in Toronto is ultimately affected by municipal and provincial issues, and ethnocultural organisations may be additionally affected by transnational issues (Grundy & Smith, 2005). Second, linguistic and sociocultural differences prevent nationally-mandated Anglophone NGOs from reaching Francophone audiences and Francophone counterparts from reaching Anglophone audiences. Avoiding being truly national in scale by focusing on other jurisdictional issues circumvents this problem. This adds to Grundy and Smith's (2005) account of the multiscalar nature of LGBT politics in Canada, in which citizenship politics can encompass and constitute a range of scales simultaneously.

But jurisdictional blurriness can have unintended consequences. It may be perceived as infringing upon the territory of others, violating the unspoken rules of the 'funding game,' as I elaborate in the final sub-section of this chapter. Insofar as jurisdictional blurriness is an adaptation to linguistic and sociocultural barriers, it may be perceived as discriminatory to the group that the NGO cannot reach. This is especially the case for national-level Anglophone NGOs, where lack of French content and absence of

presence in Quebec are perceived by Francophone NGO leaders as evidence that the offending organisations "hate French" (Interview 24). In such cases, jurisdictional blurriness has the potential to enable mission pursuit and organisational persistence but sow divisions between regional LGBT sectors. Such adaptations to sociocultural, political, and economic structural constraints and the obstacles of the organisational mission may affect inter-organisational relations—and thereby collective capacity—within a broader pan-Canadian LGBT civil society.

Adaptations to Organisational Form

In this section, I examine the types of adaptations that NGOs make to organisational form. A common adaptation is obtaining charitable status, a form of NGO professionalisation. While professionalisation can mean different things, in this thesis it refers to a process which brings NGOs closer in line with the systems of the state by adopting the structures, practices, and discourses of bureaucratic institutions (Cumming, 2008; Alvaré, 2010). Professionalisation may be conceived of as existing on a continuum. It may simply involve hiring staff with academic or professional expertise, or it can take more complex forms characteristic of a "standardisation of development" in which organisations may register with the government as legal NGO entities (nonprofit organisations or registered charities), develop a formal organisational structure, adopt bylaws, and maintain practices of financial accountability (e.g. producing annual financial reports) (Fowler, 2000, p. 105; Alvaré, 2010). Obtaining charitable status, which places the organisation under the legal purview of the Canadian federal government, is situated towards the more complex end of professionalisation. As I show, it may be driven by isomorphic pressures.

But professionalisation does not preclude other types of organisational forms. In fact, it may be the impetus for resisting it, as I illustrate with grassroots organisations. Finally, I found that many LGBT NGOs adopted business characteristics to produce hybrid organisational forms, illustrating a continuum of hybridisation and social enterprise. As I show, adaptations to organisational form are undertaken for the presumed benefits to revenue generation and management. But these benefits may not always be realised.

Embracing Professionalisation: Obtaining Charitable Status

> *"It's the formalisation of an organisation as a result of funding." (LGBT EDI NGO leader, Toronto, Interview 64)*

*

Obtaining charitable status is most common in Toronto and Calgary, where 60% or more of interviewed organisations were registered charities (see Table 3.1 in Chapter 3). 58% of all interviewed registered LGBT charities were located in Toronto. Montreal had the smallest percentage of registered charities of all three cases, where just 20% of interviewed organisations had charitable status. This reflects regional patterns in funding makeup, where Toronto and Calgary organisations are more reliant on corporate and individual donors (see Chapter 4)—revenue streams most associated with having charitable status. By contrast, Montreal organisations are most reliant on government funding, a revenue source where, unlike corporate funding, absence of charitable status is *not* a barrier to receiving money. These NGOs are therefore less likely to obtain charitable status.

There are strong coercive, mimetic, and normative isomorphic pressures (DiMaggio & Powell, 1983) driving NGO professionalisation in Toronto and Calgary. In the coercive aspect, individuals and corporations tend to prefer giving to registered charities, as charitable status demonstrates legitimacy and enables the NGO to issue tax receipts. The leader of a small Toronto-based EDI group, which promotes the election of LGBT political candidates, explained:

> "We held a fundraiser in 2014 and this was stress in and of itself because it was expensive and a lot of work to put on. And in the end, after all the expenses, we raised just a thousand dollars. It was hard getting people to donate because we can't issue tax receipts and had to resort to asking friends and family to donate. This is why we're looking to get charitable status." (Interview 60).

Obtaining charitable status therefore offers a leg up in resource mobilisation, opening the doors to a wider array of donors. With the ability to amass more funding, it may also lead to an expansion in organisational capacity. This same leader added that:

> "Not being able to issue tax receipts is a big barrier to getting funding so we're considering getting charitable status. With charitable status, we could get a Trillium Foundation grant, which would enable us to hire one full-time staff member." (Interview 60).

Charitable status is therefore seen as the likeliest ticket to more funding, even if it is not an immediate or guaranteed outcome.

Moreover, over time, working closely with corporate and government donors may encourage NGOs to behave more like them in organisational processes and structure, encouraging professionalisation. Mimetic isomorphism is also at work, where NGOs model themselves after other NGOs in times of uncertainty (DiMaggio & Powell, 1983).

The fact that almost two-thirds of interviewed LGBT organisations in Toronto and Calgary were registered charities signals to others in the sector that obtaining charitable status is the next step in the organisational life course. Finally, there is normative isomorphism at work. Indicative of professionalisation already in the organisation, those working in and leading LGBT organisations increasingly have postsecondary or professional backgrounds (e.g. nonprofit management) which predispose them to turn to professionalized organisational norms as standard, sustainable practice (DiMaggio & Powell, 1983; Interview 45). In other words, obtaining charitable status can be reflective of the organisation adapting reactively to coercive, mimetic, and normative forces in the policy domain, but also adapting proactively to create future opportunities to mobilise resources.

But a look at smaller organisations reveals that obtaining charitable status is not a silver bullet. In fact, the purported benefits of being a registered charity are embedded in broader structural and organisational constraints. Illustrative of this, one IRI-focused organisation discovered that obtaining charitable status alone did not improve their situation. While charitable status opened up more opportunities to apply for corporate funding, it was ultimately too small to be eligible: with more LGBT NGOs seeking funding, many government and corporate funding programs have gradually adjusted their eligibility criteria to consider only NGOs with a minimum number of full-time employees. These stipulations exclude most small grassroots NGOs. They also exclude many NGOs in the sector relying on a mix of mostly part-time employees and volunteers with few full-time staff. Further, lack of an office space precludes corporate sponsorship that increasingly requires a physical NGO space to send corporate volunteers. In these cases, the path to obtaining charitable status presents more costs than benefits.

Resisting Professionalisation

> *"The debate is around: do we want to be under this colonised system?" (LGBT EDI NGO Member, Calgary, Interview 15)*

*

Despite potential pitfalls, strong isomorphic pressures tend to drive LGBT organisations in Toronto to pursue charitable status as the next stage in organisational development (see Chapter 5). The effect is that the sector is disproportionately made up of registered charities, potentially foreclosing or making less desirable less formalised and professionalised methods of organising. Alternatively, it may also be fertile ground for

producing NGOs to buck the trend. For instance, while Toronto has the highest proportion of registered charities, it also has the highest proportion of grassroots organisations (those which do not have registered nonprofit status).

The pattern is similar in Calgary, where the high proportion of charities is contrasted by the presence of radical grassroots organisations, some of which are governed by horizontal power structures. An adaptation to address challenges in accountability and power imbalances found in professionalised NGOs, one such group makes its decisions by consensus. But while a bottom-up, power-sharing form of governance, the organisation is stymied by stasis on issues. The refusal to attain even nonprofit status also limits the group's available revenue sources to small individual donations.

Hybridisation: Adopting Business Characteristics

> *"We're run like a company. But we're a community-based company." (Queer Women's Social Enterprise Leader, Montreal, Interview 71)*

*

An emerging trend in Toronto and Montreal, some organisations have gone in a different direction with respect to professionalisation, producing a hybrid NGO form with pronounced business characteristics (Billis, 2010; Lewis, 2014). In this hybrid, a business ethos informs how the NGO is run and facilitates its capacity to adapt to changing conditions. This is the case for a Toronto-based IRI-focused NGO, which its leader described as an intentionally and perpetually "lean organisation" (Interview 51). Maintaining a minimal staff of six and a small unit in a shared office space for start-up companies allows most of its funds go to its primary activity: arranging for emergency travel support for refugee clients. Ensuring a supply of 'slack' or excess financial resources (Pfeffer, 1981; Geiger & Cashen, 2002) have enabled the NGO to scale up to respond to LGBT refugee crises.

Social enterprise is another example of this NGO-business hybrid. Social enterprise provides a 'business' source of revenue for NGOs (Kerlin, 2010). This approach is evident in a national-level Toronto-based EDI organisation. To help fund its diversity and inclusivity workshops in schools across Canada, the group sells organisation-branded merchandise, which it distributes to social media influencers to promote the NGO's work and promote further sales. All revenue, including speaking fees, is put towards the NGO's primary activity of inclusivity workshops and sustaining a staff of three. This is made

possible by low overhead, as well as the NGO's lean, mobile infrastructure: in lieu of an office, the organisation is run out of a rotating roster of coffee shops. Significantly, the group has managed to leverage multiple corporate sponsorships which fund travel costs and program expenses. These sponsorships include a major frequent flyer loyalty program and a well-known skincare and cosmetics brand, a major feat for a young NGO with no pre-existing corporate connections and which obtains its sponsorships through a campaign of cold-calling.

Yet, as scholars (Hildebrandt, 2015; Conforth, 2014) have noted elsewhere, a business ethos of a lean, competitive organisation may not fit all aspects of an NGO addressing broad social issues. While the group runs hundreds of workshops per year, the NGO has little interaction with other organisations in the LGBT sector, preferring to focus on its own activities. With weak sector ties and no storefront office space to locate the group, few LGBT NGOs have heard of the organisation. In another drawback, the lack of sector ties forecloses opportunities to learn from other organisations doing similar work and leveraging funding streams it has yet to tap.

At the other extreme, adopting business characteristics to organisational form may mean that the NGO is not an NGO at all, or does not remain an NGO. In Montreal, at least one arts and culture-focused social enterprise strategically registered as a business for purposes of revenue, capacity, and management. Having seen the capacity-sucking effects of the NGO project funding cycle, specifically through the *BLCHT* (see Chapter 4), its leader opted for a business model, a move which would also reduce the competitive strain on NGO funding in the LGBT sector. Volunteer retention was a common problem mentioned across cases. To address this, the organisation produces a magazine on top of curating social events, with the magazine both an LGBT cultural product and an interactive long-term project to retain volunteers year-round. Interestingly, the business model enables its leader and staff to "take the emotion out of things" when making rational, cost-effective decisions, a benefit its leader contrasted with the personalistic nature of LGBT NGOs where the social/human bottom line makes it difficult to leave emotions at the door when running the organisation (Interview 71).

Like professionalisation and grassroots organisational forms, hybridisation is undertaken to better the chances for long-term survival by shoring up organisational sustainability. These adaptations to organisational form are pursued with the intent to increase resource mobilisation potential, manage the organisation according to personal ideals, retain organisational capacity, and to produce more rational decision-making—in

other words, to manage the organisational and regional structural pressures in the post-marriage context. As I have demonstrated, these benefits do not always materialise and may be impeded by these very forces. Yet, hybridisation and grassroots organisational forms are examples of LGBT organisations at the more active end of the adaptation continuum, where organisational actors anticipate and attempt to pre-empt future operational challenges by departing from common professionalised LGBT NGO forms. In adopting novel organisational forms, these groups challenge prevailing norms of what an LGBT NGO looks like and how it behaves.

Adaptations to Organisational Features and Frames

To navigate organisational and structural pressures after policy progress, LGBT NGOs may also adapt their features and frames. Adaptations to organisational features include amending the organisation's name and language of use. Frame-wise, LGBT organisations cultivate compelling narratives about their activities and continued relevance to mobilise sources of revenue, reflect the policy progress they helped bring about, and to manage the resource mobilisation constraints associated with possessing multiple organisational identities.

Adaptations to Organisational Name

Commonly, LGBT NGOs may adapt their name to reflect growing community diversity. The intent is to remain relevant and thus sustainable in an evolving policy domain. But as I found, this adaptation to a recognisable organisational feature may present unforeseen challenges.

With the expansion of identity groups seeking to be recognised and included in the LGBT community (see Chapter 4), the LGBT acronym has been regularly amended to reflect the diversity of the community. LGBT (lesbian, gay, bisexual, transgender) has been used since the 1990s, adapted from LGB, which replaced the all-encompassing term 'gay' in the mid-late 1980s (Mitchell, 2017). Since then, additional letters have been added: Q for queer, Q for questioning, I for intersex, A for asexual, A for ally, and P for pansexual. In Canada, '2S' for two-spirited is frequently added for Indigenous sexual and gender identities possessing both masculine and feminine spirits. P may be added for polyamorous, and T may be added for transvestite (those who cross-dress). As such, various iterations of the acronym can include 'LGBT,' 'LGBTQ,' 'LGBTQ2S' or

'LGBTQIA2S' which are common in Canada, and 'LGBTTQQIAAPP2S'—the latter term illustrative of an unwieldy expansion which some in the LGBT sector and community critically refer to as 'alphabet soup' (Interview 59).

Anticipating the future continued expansion of the term, one Toronto community funder has had three different organisation names. In the final name change, it proactively adopted a general moniker with no mention of the LGBT acronym in order to avoid settling on a term that would later become outdated. While as inclusive as possible, the new name unexpectedly presented a problem for soliciting donations: it did not resonate with long-time donors for whom the original name was a piece of Toronto's LGBT history. Given the power of emotional connection in prompting individual giving, the group reverted to using its original name in communications.

In the case of a long-established Montreal-based group, organisational name change was geared in part to reactively reflect evolving community diversity—a long overdue move as its long-held name simply referred to the LGBT community as 'gay'—but also for organisational renewal. With a more inclusive name, the NGO was able to attract more women, trans, and non-binary volunteers. Formerly under the decades-long stewardship of a charismatic leader, the name change also worked to carve out the space for the NGO to be associated with its new leader in the media, community, and wider public. It also worked to distance itself from the outdated views on LGBT issues of its predecessor leader, a well-known gay activist. However, the name change faced resistance—not from donors, but board members within the organisation with a strong emotional connection to the original name and the history it signified. The move solidified the break between LGBT organising of the past and that of the future. With an intransigent board yearning for the NGO's former glory days, the change to a symbolic feature of the NGO has made it more difficult for its leader to push forward other changes to the NGO, such as revenue diversification.

These examples illustrate in different ways the embeddedness of certain recognisable features in organisational history and culture. While such proactive and reactive adaptations may open up new opportunities for organisational renewal, they may also introduce new challenges which make impede it. Changing the organisation's name may also be easier said than done, reflecting its potential sticking power amongst donors and supporters the older and more well-known the organisation is.

Adaptations to Language

In addition to organisational name, language itself may also be adapted, albeit a more challenging feature to modify. For Montreal's LGBT NGOs, the French language poses an added challenge to gender identity-based work. French is both the official and primary language of Quebec, with 57% of the Montreal's population speaking primarily French at home (World Population Review, 2020b). Gender-neutral options, increasingly common for LGBT populations in English-speaking contexts, do not exist in the French language. Even *ils*, or 'they,' the gender-neutral pronoun in English, is masculine by default in French. This makes it difficult for the inclusion of trans and non-binary people who opt for gender-neutral language. Consequently, LGBT NGOs have actively adapted the French language in line with LGBT discourse in the French-speaking world. The gender-neutral *iel* is a combination of *il* and *elle* masculine and feminine pronouns.

But challenges to full inclusion remain. While pronouns can be gender-neutral, nouns, verbs, and adjectives are still gendered in French, making a fully gender-neutral practice nearly impossible. As an LGBT NGO leader explained, "You literally have to create a new language" for non-binary people (Interview 20). This makes misgendering—or referring to someone by the wrong gender pronoun, prefix, or suffix—a constant in everyday life. On the flip side, these barriers to inclusion created by language may aid the persistence of LGBT organisations, as trans and non-binary inclusion will likely be a persistent problem for the foreseeable future—one embedded in the societal structures of language and sustained by the Québécois imperative to speak and utilise French.

Adapting Narratives of Success and Continued Relevance

To fit diverse funding requirements and to satisfy competing stakeholders, LGBT NGOs adapt the framing of what they do. Borrowing from Goffman's (1974) frame analysis perspective, this refers to shaping the language and narratives associated with the organisation's activities to influence how audiences interpret them. Illustrative of hybrid characteristics, some in the LGBT sector have likened framing to a "marketing and business acumen" to persuasively convey to individual donors, beneficiaries, and supporters what the NGO does and how it has achieved its goals (Interview 67; Billis, 2010; Lewis, 2014).

Invoking interpretivist approaches to success (see Chapter 2; Mosse, 2005; Meyer and Höllerer, 2016), this speaks to the extent to which carefully constructed narratives matter for LGBT NGOs in conveying what they do and how well they have done it. In an increasingly competitive environment where funding opportunities have become narrower

and the range of issues and identities more expansive (see Chapters 4 and 5), these narratives matter even more for resource mobilisation. Moreover, as LGBT NGOs are increasingly faced with the challenge of appealing to donors who differ socially and economically from their beneficiaries (see Chapter 4), investing in organisational storytelling capacity becomes ever more important. As this is a time-consuming and resource-intensive process, large, professionalised, well-resourced organisations are at an advantage.

Adaptations to framing are particularly necessary to navigate changing political and economic structures as a result of policy progress. To adapt to restructured government funding opportunities for HIV prevention and treatment, Toronto's HIV service providers have begun reframing their function as a pitch for continued relevance in the declining HIV/AIDS crisis. One NGO, for example, has proactively reframed itself as a service "hub" for people living with HIV (Interview 62). While their work in providing financial and practical assistance has stayed the same, their selling point is now helping clients navigate more swiftly through the province's convoluted social services system through referral services. In a parallel to the long-term persistence of the city's minority ethnospecific ASOs (see Chapter 4), the success of this adaptation is contingent upon government bureaucratic inertia in streamlining access to its social services system. Government reform would lessen the need for a hub.

Tellingly, smaller HIV service providers such as minority ethnospecific ASOs tended not to act until it was almost too late. By comparison, large providers proactively enacted these changes early on. While all HIV providers likely anticipated the time and effort required to enact these adaptations, large providers possessed greater capacity and resources to act early. As the leader of a major HIV service provider explained:

> PHAC's [Public Health Agency of Canada] new funding strategy switched from a treatment to prevention focus. As a result, many ASOs lost funding. Some tried to fit in things that just would not get funded and it didn't work. But because of this new funding structure, we actually doubled our federal funding because we had the data on the effectiveness of our programs, we were able to present it, and this led to more funds to scale up the program… With the new funding structure, you can't put in crappy funding proposals. A lot of effort is required. (Interview 49).

An executive of one large HIV service provider further added:

> A charity can't turn on a dime. It can't change immediately to weather the transition period. So the board looked forward and saw the upcoming changes. At the federal level, there have been changes to funding. Some of these changes have been positive but every time there is a change in government priority, we need to

> re-evaluate what we do. It's like fitting a square peg through a round hole. (Interview 62).

Thus, while adaptations to framing may reflect a high degree of activeness, the organisational capacity to tell compelling narratives and effectively shape stakeholder perceptions is ultimately circumscribed by resource level. Effective framing requires organisational capacity, human capital, the collection and mobilisation of compelling program data, and financial resources. This reflects a degree of bounded agency.

Adapting Framing to Negotiate Multiple Organisational Identities

I find that framing is especially necessary and of strategic value for organisations with multiple identities. The more intersecting identities the NGO addresses, the narrower the focus and the smaller the beneficiary pool. This limits the funding options available. Such organisations may therefore adapt by strategically highlighting one identity over the other(s) to access funding. For instance, Montreal-based queer women's NGOs do not cater to all LGBT people nor all women—only one subset of each population. But they fulfil both women's and LGBT NGO categories for Quebec provincial funding. As such, they strategically apply to the women's NGO funding category because it is less competitive: in this category and in contrast to the LGBT funding category, they are the sole organisation addressing women's issues *and* offering women's services with a queer focus. On the more active part of the continuum, this adaptation is an example of one where the organisation exercises its agency by choosing which arena to compete in and which one to exit based on its own forecasted odds of success (Batley & Rose, 2011).

But there are costs to using framing as a resource mobilisation strategy in the context of multiple organisational identities. Receiving funding from the women's program affects how the NGO frames and carries out its programs, effectively situating the group within a women and gender-centric sphere. This has made it more difficult for queer women's NGOs to find opportunities to collaborate with other LGBT NGOs and vice versa. Rather than challenging sexism from within the LGBT sector, they are left to do so at its periphery. This makes the mission of these groups more difficult to achieve and progress on this front more difficult to attain. However, as noted earlier, the slow pace towards mission accomplishment also means the organisation will remain of instrumental utility for the foreseeable future, aiding its long-term persistence.

Adaptations to Funding

In addition to adapting organisational features and frames, LGBT NGOs have adapted to constraints in resource availability and mobilisation by seeking alternative or additional sources of funding. Put off by the constraints of government funding (see Chapter 4), many organisations have pursued corporate funding as an alternative revenue source. Others have looked to individual donors as a sustainable source of revenue, going beyond one-off donations to cultivate philanthropic programs. However, I find that the changing demographics of individual donors make this investment in philanthropy a challenging and resource intensive one, and further embedded in the regional societal forces shaping individual giving behaviour.

Corporate Funding as an Alternative Revenue Source

With the growth in LGBT service provision and advocacy and in available government and corporate funding to match, the number of LGBT programs and organisations has risen accordingly. As mentioned in Chapter 5, there are now more LGBT organisations across all three cities than ever before. With demand outstripping the supply of state funding, coupled with the constraints of government funding programs, many LGBT organisations have gone beyond simply diversifying their revenue streams, a common practice in for-profit and non-profit management (Hung & Hager, 2018; Carroll & Stater, 2009; Tuckman & Chang, 1991). Instead, they have pursued alternate long-term funding strategies. For instance, with fewer resources to spare, younger organisations across cases are likeliest to avoid government funding completely in favour of corporate and individual donors. As such, many small and grassroots NGOs are paradoxically sustained by corporate sponsorships.

This strategy may also reflect the experiences of NGO leaders, where negative experiences with government funders or regulators in one sector influences the funding trajectories of organisations they subsequently lead in other sectors. This is especially the case for leaders migrating from the heavily state-funded HIV sector to the LGBT sector. These individuals are more wary of the changing whims of government funding and the capacity of the state to over-regulate or abuse regulatory powers. In a formative development, in 2012, a politically-motivated federal audit of charities swept up a major HIV NGO, creating a chilling effect on EDI activities throughout the HIV and LGBT sectors (Beeby, 2014; see Chapter 4). Consequently, a major IRI organisation led by a

former HIV NGO executive deliberately pursues only corporate and individual donations, completely eschewing government funding. Its leader explains:

> We don't accept money from government. We are 100 percent funded from the community and our allies. It gives us a stronger position to be at the table with government… My experience at [HIV NGO] and in the HIV sector has taught me that government funding can shift and so you can't rely on it. We will keep going as long as the community stands with us. (Interview 51).

This may be a variant of what Lewis (2008) discusses with respect to the boundary-crossing experiences of organisational actors whose work in and approach to the third sector is informed by prior experiences in public or private sector organisations. Informed by previous sector experience, this funding strategy is simultaneously both politically and economically strategic: it anticipates how funding sources impact the NGO's position with government partners and pre-empts potential challenges associated with government funding. By reacting to developments in a previous issue area, actors within the organisation adapt proactively in another issue area before the external threats impact NGO survival.

But while LGBT organisations have increasingly turned to corporate funding to diversify their revenue streams or as an alternate funding strategy, the growing demand threatens to outstrip the carrying capacity of corporate donors. As I previously noted, the opportunity to rely on corporate funding is narrowing (Chapter 4).

Crowdfunding and Building Philanthropy

With narrowing corporate funding options, individual donations have become a newly vital source of funding. For the major IRI organisation mentioned above, crowdfunding has been an unexpected but welcome source of individual donations, enabling the organisation to respond to crisis situations that cannot be planned for in advance. Of course, this opportunity is contingent upon the type of issues the organisation addresses. The group's focus on relocating persecuted LGBT refugees enables it to elicit a high volume of crowdfunded donations in a short amount of time, in one instance amassing $250,000 from 10,000 unique donors via a third-party Facebook fundraising campaign (Interview 51).

Generally, however, one-off donations are unsustainable. Given their resource dependence, I found that many LGBT NGOs have begun investing in philanthropy, or regular patterns of individual long-term giving (see Chapter 4). Philanthropic efforts are targeted to the LGBT community and its supporters (including wealthy benefactors), and

seek to establish regular giving behaviour over time, whether in small amounts or large sums. While fundraisers are part of these philanthropic efforts, the resources required to hold fundraisers has caused many organisations in the LGBT sector to minimise or rethink their utility. Indeed, as noted in Chapter 4, fundraisers have additionally become costlier as corporate donors seek to minimise how much of their funding can be used for fundraisers, as this money contributes to paying for overhead rather than actual programs.

But while cost is a primary motivating factor for moving away from fundraisers, so is the relationship between NGO and donor how this can be crafted to mobilise more donations through different resource mobilisation strategies. The leader of a major Toronto HIV service provider explained:

> We have two big fundraising events that we hold but we're moving away from this because they're expensive to hold and we're shifting the way we engage with donors. We're shifting to using testimonials from people who have been helped by us and this speaks to our donors more than giving them the numbers of services that we're able to offer per year. It's a more donor-focused and donor-centric shift. (Interview 49).

As such, the desire to cultivate a different relationship with donors may both drive and be facilitated by the shift to philanthropy. In the drive to develop philanthropy programs, philanthropic efforts of LGBT NGOs typically include soliciting donations through their websites, through annual giving programs, or via third party organisations or events. While recent NGO investments in their philanthropy programs are a reaction to the declining stream of government and corporate funding, the development of philanthropy as a reliable stream of funding requires significant advance planning. It is both a reactive and proactive adaptation, generating a new funding stream in anticipation of future resource mobilisation challenges.

Philanthropy allows organisations to sustain their budgets for the long run as well as providing the capacity to address pressing issues. For instance, in 2017 a major community development organisation in Toronto stepped in to settle LGBT refugees quietly spirited out of Chechnya, an immediate crisis response made possible by slack financial resources amassed through philanthropy over a years-long period. As its development executive explained, "you can't just budget for Chechen refugees to come here… Philanthropy enables [us] to genuinely respond to community need… Philanthropy enables a bubble of nimbleness" (Interview 47).

In the current context, investing in philanthropy means tackling a demographic shift in the LGBT donor base. As the core donor base of older gay men ages, LGBT NGOs are

turning their attention to appealing to their future donor base: young millennials. While the number of Generation Y/Millennial donors (aged 39 and younger) is steadily increasing, financial circumstances and the influence of social media make this a challenging new donor base to appeal to. As an HIV NGO leader in Toronto explained:

> Younger people give differently… They want an experience before they decide to commit to donating. And they have less disposable income to give to charities, so they really 'shop around' before deciding to donate. It's not just a halo effect of the donation but it's about personal satisfaction. (Interview 65)

In fact, donors under 25 are likeliest give their time in lieu of money (Lasby & Barr, 2018). Appealing to millennials thus requires more resources and a major shift in fundraising strategy that advantages large well-resourced organisations and, to a smaller degree, emerging youth-focused organisations already tapped into this donor market. But not all LGBT organisations can afford this. Some NGOs have instead turned to corporate funding to fill the funding gap until they can figure out how to reach millennials.

However, I note that in the push to grow philanthropic channels, there is an important caveat: the potential gains of philanthropy are circumscribed by societal structures. As shown in Chapter 4, with strong regional giving norms, Calgary and Toronto organisations stand to benefit the most from investing in philanthropy: people are likelier to donate and to donate in larger sums. In Calgary, western regional traditions of self-help and reliance on the community circumscribe strong patterns of individual giving. By contrast, with weak giving patterns shaped by vestiges of French Catholic norms around humility, individual donations in Montreal tend to be infrequent and small. For Montreal's LGBT NGOs, the adaptation of investing in philanthropy may be too costly, with little return.

Adaptations to Regular Operational Levels

Across cases, under-resourced NGOs grapple with the reality that pursuing their mission with all cylinders firing would outstrip organisational capacity, even hastening organisational death. In order to sustainably pursue their missions amidst the challenges posed by progressive policy shift, these organisations adapt by adjusting their regular operational levels. In this section, I illustrate the strategic temporality of organisational operations and growth, adaptative behaviour situated within structural constraints around funding and unstable organisational capacity. In doing so, I demonstrate the potential benefits of remaining inert, challenging the dominant scholarly interpretation of

organisational inertia as being necessarily regressive. I further contribute to the scholarly analysis of organisational continuity by introducing a new concept: organisational hibernation.

Organisational Hibernation: Maintaining Continuity During Periods of Resource Scarcity and Organisational Transformation

'Organisational hibernation' is a new concept I offer in this thesis to describe adaptive behaviour undertaken to maintain organisational continuity during periods of resource scarcity and constraints to organisational form—challenges posed by structural forces and progressive policy shift. It refers to a period in which the organisation strategically operates at the lowest possible capacity while remaining an active organisation. It occurs when the organisation lacks sufficient resources to operate at full capacity, namely human capacity (i.e. human resources such as members and volunteers—see Chapter 5) and/or revenue (e.g. funding). It can also occur when the organisation undergoes structural transformation; in this case, the organisation perceives this process of transformation as better positioning it to fit an evolving policy domain.

Hibernation is distinct from a dormant organisation. Whereas a hibernating organisation slows down its operations but is still active, a dormant organisation is no longer active—either temporarily or permanently (see Figure 6.2). In a less dormant state, the organisation is on hiatus, in which all organisational activity has temporarily ceased. In hiatus, organisational operations are on pause and the group is temporarily inactive. Hiatus is exemplified by a Toronto-based EDI group focused on electing LGBT candidates to political office. Its leader described the group being on "a bit of a hiatus" when he went abroad to graduate school, at which time all activity at the NGO temporarily stopped (Interview 60). When the NGO's leader returned from graduate school, the organisation resumed its activities.

In the most dormant state, I suggest that the group exists in name only and is no longer operational—for all intents and purposes, it no longer 'exists' (see Figure 6.2). For instance, the group may still be found in non-profit registries and their organisational email may still exist, but the group is no longer active. Their social media pages may still exist but show no recent activity and no indication that the group is still active. This is the case of Lesbian and Gay Immigration Task Force (LEGIT), a national organisation founded in 1991 providing immigration information to same-sex couples. While the group's website still exists, the information appears dated, citing legal advice from 2003. Its email address

is still functional but my attempts to reach the group were unsuccessful. Tellingly, while the NGO has/had chapters across Canada, the group's name did not come up in any of my interviews. There was no indication that the group was active in Toronto, Montreal, or Calgary's LGBT sectors, suggesting that LEGIT is a dormant organisation. Alternatively, there may be no trace of a dormant organisation except for passing references: this is exemplified by Gay and Lesbian Asians of Montreal (GLAM), which has long shut down, but brief mentions of the group can still be found online and in scholarly materials.

By contrast, a hibernating organisation is still active, albeit at the lowest possible level, in response to resource scarcity or to undergo structural transformation. As noted in Chapter 2, hibernation can be temporal and a strategic adaptation utilised for short-term or long-term purposes. This differentiates it from Meyer and Zucker's (1989) similar concept of permanent failure, which characterises a persistent state of low performance which an organisation falls into. Furthermore, my concept of hibernation focuses on periods of resource scarcity and organisational transformation. This differentiates it from Taylor's (1989) concept of abeyance, in which social movement actors withdraw from active engagement on policy matters and focus on preserving movement values and identity by organising internally oriented activities (Sawyers & Meyer, 1999; Lee et al., 2020). An unreceptive political environment is the primary condition under which abeyance occurs, and activists 'wait it out' until the political environment becomes more favourable to the movement's agenda.

By contrast, the receptiveness of the political environment is not the primary factor in the decision to *hibernate*, though it may be at play. By focusing on the resource and organisational contexts rather than mainly the political opportunity structure, this opens up the concept of hibernation to a wider range of organisations beyond social movement organisations engaged in political contention. This concept of hibernation advances debates on organisational continuity (Lee et al., 2020; Jacobsson & Sorbom, 2015; Valiente, 2015; Sawyers & Meyer, 1999; Taylor, 1989; Meyer & Zucker, 1989).

I found that organisational hibernation is most often found amongst small, volunteer-run, organisations such as small EDI and community development LGBT NGOs. The features of small organisational size, few resources, and small beneficiary and supporter base enable volunteer-run NGOs to scale up and scale down to adapt to the shifting organisational and structural conditions of long-term policy progress. As such, hibernation was most observable in Toronto where a larger number of small volunteer-run EDI and community development organisations were located compared to the other two

cases. However, despite not being captured in the data, instances of hibernation were still likely to have occurred in Calgary and Montreal for two reasons. First, the data in this thesis is not a complete capture of the LGBT NGO sectors across all three cities due to some non-response bias (see Chapter 3). As such, additional cases of organisational hibernation may have been taking place outside of the scope of the collected data; in fact, hibernation may be a plausible explanation for why some organisations were unreachable/unobservable. Second, the high rate of leader turnover in the LGBT NGO sectors means that hibernation may have previously occurred in the organisation, but interview participants were unaware of it.

In Toronto, a queer liberation advocacy NGO illustrates how organisational hibernation may be a long-term, persistent state undertaken when resources are scarce. Same-sex marriage legalisation had settled the marriage debate, extinguishing a key part of the NGO's policy platform and pre-empting pursuit of the rest of it (see Chapter 5). Four years after same-sex marriage was legalised, the group closed. In its place was a much smaller successor group with the same queer liberationist agenda devoted to challenging mainstream societal norms. A mostly online archival project—indeed a "temporal thing" based around members' busy schedules—the new group too is currently slowing in activity (Interview 74). In fact, the reason for its existence is also the reason for its decline: the normalisation of LGBT identities and lives after same-sex marriage. Post-marriage, the issues of mass community interest have changed. LGBT people are now more "invested in celebration and in infiltrating the mainstream and having a place in mainstream society through things like arts and sports… People are more concerned with events like Pride" (Interview 74).

While the issue receptiveness of the political environment is at play here, I suggest that it is overshadowed by the scarcity of human resources. Interest in the NGO's radical agenda waned after same-sex marriage but found a new receptive audience in a younger demographic. As the membership of the old queer liberationist group aged out of the NGO, the successor group began to attract young, tech-savvy people electrified by the radical queer liberationist politics not represented in mainstream LGBT culture. But while the organisation's reliance on its young membership base was crucial to building and maintaining the NGO's new online platform, it inevitably meant a revolving door of members. In the current socioeconomic context in which temporary labour and pursuing higher education are the new normal, young people live more mobile lives than before (Statistics Canada, 2017b). As the NGO's leader attested:

> We attracted a lot of university students at the start, but they would eventually approach me and say, 'I really want to stay but I just got into my masters program.' And my response would always be, 'You go live your life!' (Interview 74).

When LGBT rights are settled and operating on an online platform makes it more difficult to gauge organisational impact, it is also easier for the organisation's young members to move on. Without a sustainable membership base to do the day-to-day "grunt work," activity has slowed to a persistently low state of hibernation contingent upon members' busy schedules (Interview 74). Thus, even with greater political interest in the NGO's liberationist agenda, the problem of unstable organisational capacity persists, underlying its long-term state of hibernation. Long-term hibernation enables the organisation to remain active at a level which fits available capacity, ready to scale up activity when sufficient capacity is achieved—and to scale back down when capacity becomes insufficient again.

Hibernation was also observed as a short-term adaptation undertaken for structural transformation in addition to resource scarcity. This is seen in the case of a Toronto-based Muslim LGBT EDI and community development NGO. This group engages in LGBT rights advocacy and works to cultivate a pan-Canadian Muslim LGBT community, appealing to LGBT people from various Muslim sects and ethnocultural backgrounds. Long after same-sex marriage legalisation, the intersectional nature of its mission and mandate encounters a receptive political environment similarly focused on intersectional issues and identities in the LGBT community (see Chapter 5). However, as its audience includes groups that may have religious or geopolitical differences, creating an inclusive space for all is additionally challenging. As I later discuss with respect to maladaptations, it is fraught with risks to organisational legitimacy in the current climate of identity politics.

But while the issue of political receptiveness is at play here, it was not the primary reason for hibernation. For this group, short-term hibernation has been crucial to relaunching the organisation under new leadership. The crux of the issue was figuring out how to completely redesign its organisational management structure as an alternative to NGO professionalisation and in the interests of sustainability. As its leader noted, the goal during and after hibernation was "building sustainable infrastructure. It's not about the size of the group but it's making sure people aren't overwhelmed by the work and that there is continuity" (Interview 64). Attesting to the scale and purpose of the structural transformation, he added "We're trying to stay away from the ED [executive director] and program director titles because we're not there yet, but we also don't know if that's what we want" (Interview 64).

Significantly, a scarcity of resources is also at play in the form of a lack of funding and organisational capacity. To actualise the new management structure, hibernation has been crucial to mobilising sources of revenue and recruiting new volunteers. In hibernation, the group has scaled back service provision and advocacy in favour of offering a minimal number of social gatherings targeted to members and supporters to remain active. Operating at minimal capacity offers the time and space to revamp the organisation structurally, financially, and human resource-wise while minimising confusion to beneficiaries and supporters amidst restructuring.

As these examples show, small organisations may undergo short-term or long-term periods of hibernation as a means of maintaining continuity during resource scarcity and/or lack of structural 'fit' with the policy domain. In hibernation, organisations slow their activity to the lowest possible level while remaining an active organisation. This conserves scarce financial and/or human resources until the group can build up these resources to return to full operational force. Hibernation can also offer the capacity to engage in processes of structural transformation with the intent of better positioning the organisation for sustainability in an evolving policy domain. In this way, the organisation behaves much like a storefront operating at scaled-back capacity while undergoing renovation. While political conditions may be at play, resource scarcity and structural transformation are the primary conditions for organisational hibernation, differentiating this new concept I offer from similar concepts of abeyance (Taylor, 1989; Sawyers & Meyer, 1999; Lee et al., 2020) and permanent failure (Meyer & Zucker, 1989).

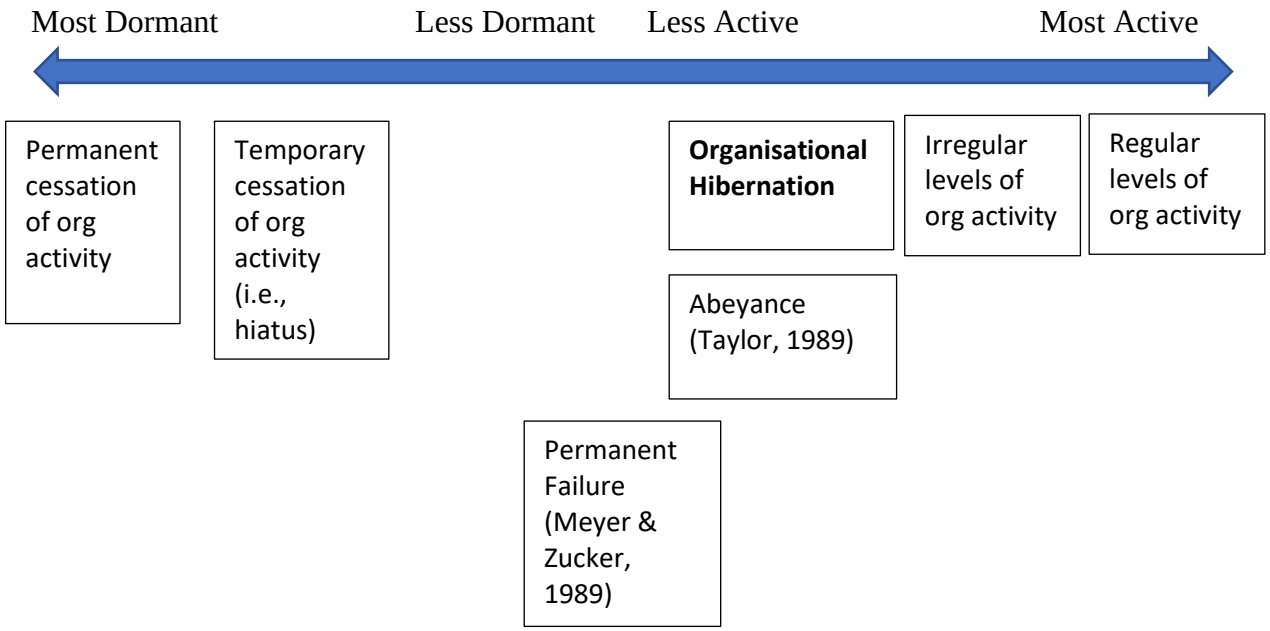
Like many of the previous adaptations discussed, hibernation contains both reactive and proactive elements as an organisational adaptation (see Figure 6.1). There is a proactive element in the organisation taking stock of its resource levels and organisational actors making the judgment that hibernating would be the best course of action for continued survival. But to be sure, the very nature of hibernation as an adaptation is a mostly reactive one: the organisation slows down its operations until conditions improve, especially when hibernation is undertaken for reasons of resource scarcity. In other words, the organisation is waiting it out. Moreover, in the cases examined, hibernation tends to occur when the organisation is already at a very low resource capacity, when it is almost too late to act. Compared to the previous adaptations examined, I classify hibernation as existing on the more reactive end of the adaptation continuum.

To be sure, on a continuum of dormant versus active organisations (see Figure 6.2), I situate both organisational hibernation and abeyance as adaptations undertaken to remain

an active organisation. Responding to different factors, hibernation and abeyance contain similar adaptive behaviours and therefore occupy a common space on this continuum. They are situated on the active side of the continuum but at the lowest level. Hibernation and abeyance precede the less dormant states of organisational activity. At the furthest end of the active side of the continuum is an organisation operating at regular levels of activity (where what 'regular levels' mean is defined by those internal to the group). In between regular operational levels, hibernation, and abeyance are irregular levels of organisational activity: that is, short-lived dips in regular organisational activity, where organisational activity alternates between what is regular and irregular for the organisation. These dips become more frequent as they approach hibernation and abeyance.

I situate permanent failure near the middle of the continuum on the more dormant side of the spectrum, but with a foothold on the active side. It overlaps with hibernation and abeyance to a degree to indicate the commonality of low organisational activity. However, it is ultimately situated on the more dormant side because permanent failure is a permanent state of low performance that an organisation 'falls into,' rather than a strategic adaptation like hibernation and abeyance. It may indicate that the organisation will become less active over time and fall into a more dormant state. On the increasingly dormant end of the continuum is hiatus, in which the organisation temporarily ceases all organisational activity for a sustained period of time. On the furthest end of the continuum is a fully dormant organisation, where all activity has permanently ceased. To note, the placement of the above adaptations and stages of activity in Figure 6.2 does not imply that all organisations must go through each stage sequentially or at all. For example, a group may go from operating at regular levels to going on hiatus, to operating at irregular levels, to then deciding to hibernate in order to remain active with the resources available.

Figure 6.2: Hibernation on a Scale of Organisational Activeness



Organisational Inertia: An Adaptation Grounded in Agency

> *"Some years we are very successful in getting government funding. Other years, we know we're going to come up with a deficit by the end of the year and I will have to send out an email to members saying we need donations." (LGBT EDI NGO Leader, Montreal, Interview 24).*

*

In addition to hibernation, organisations may adapt their regular operational levels by limiting the bounds of their work (Hildebrandt, 2013). This is seen amongst service providers, where to protect against overextending, organisations may treat growth as temporal, resist it, or leave in place barriers to service access. In these cases, immediate survival may lie in organisational inertia to maintain the organisation. This mirrors the paradoxical relationship between bureaucratic inertia and NGO persistence discussed earlier and in Chapter 4. Organisational inertia refers to the capacity to resist change and maintain the status quo as a result of institutionalised patterns of activities (Hur et al., 2019). Inertia is observed elsewhere in studies of organisations and is frequently conceptualised as undesirable, as it suggests a harmful resistance to change within the organisation (Huang et al., 2013; Geiger & Antonacopoulou, 2009; Schaeffer, 1998). While not a new concept, I have reconceptualised organisational inertia here as a strategic

adaptation that may be undertaken to maintain the organisation, one which may have survival benefits and which reflects organisational agency rather than a lack thereof.

In Calgary, the rapid growth of a trans youth NGO illustrates that organisational growth may be risky depending on state structures. The group's shift from advocacy to service provision enabled it to fill a gap in social and medical support for gender-transitioning youth and their families. It remains the only clinic in Alberta for trans youth under-15 to access trans medical care and has been an important hub for parents to navigate the web of government support (Interview 14). Within three years of its emergence, the organisation adapted to rising service demand by minimising its advocacy role in favour of greater service provision. Importantly, it also scaled up. Its sole reliance on corporate and individual donations was no longer enough, pushing the NGO to obtain government grants to fund up to 50% of its operations (Pike, 2019; Interview 14). However, rapid growth powered by unreliable government funding proved to be unsustainable: vital grants have been discontinued under a conservative provincial administration. Meanwhile, service demand continued to grow, threatening to outstrip organisational capacity. To survive, the NGO pursued a path of stasis, pausing the intake of new clients in order to maintain services on offer (Pike, 2019). Curtailing growth by delimiting the bounds of service access was based on the calculation that more people would be negatively affected if the NGO attempted to serve everyone who needed it.

A similar pattern is observable in Montreal where the costs of growth and meeting all needs in the community would be detrimental to the organisational livelihood. This pattern cuts across organisational size, age, resource level, and funding makeup. Even for a well-resourced provincial-level EDI NGO, the annual "uncertainty" of the funding game is such that despite their strong track record of obtaining multi-year government funding partnerships, expansion of their workplace inclusivity training workshops is risky (Interview 24). Similar to the Calgary example, growth has become temporal, with scaled-up capacity contingent upon a continuous stream of government funding. But rather than growth followed by a plateau of inertia when government funding falls short, I find that growth is followed soon after by contraction in a repetitive cycle. Capacity and services rise and fall with funding availability to constitute a regular pattern of the organisation's operational levels—a 'satisficing' move deemed 'good enough' to meet rising service demand within the NGO's opportunity structure (Simon, 1945).

For one gender diversity organisation, which offers support groups, grassroots NGO funding, and is one of two storefronts in the city to provide subsidised chest binders

to trans and non-binary people, barriers exist in its geographic location. While the NGO offers bilingual services, its location in the Anglophone area of Montreal deters Francophones. Moreover, its location on a major university campus intimidates and deters residents of a lower socioeconomic background. While the NGO is aware of these barriers to accessing its services, acknowledging that there may be many more people it cannot reach, I note that limitations to access may work in favour of the organisation's livelihood: its leader admitted that if they were able to take all requests for their services, the staff would either burn out or—like its Calgary counterpart—they would have to turn away clients. As a result, barriers to service access are left in place in the interests of sustainability of the organisation and its service offerings.

Similarly, a queer women's community development NGO balances the social imperative to do more for its refugee clients with the reality that service expansion without reliable funding would be unsustainable and even detrimental to its clients. At present, refugee clients only use the NGO to obtain refugee status. While there is a desire to incorporate more queer women refugee services into the NGO's offerings—including services for refugee arrival, preparation for immigration court hearings, job search support, and social integration—the organisation is limited by capacity and funding (Interview 36). As its leader observed, "We could do more, but we can't… We don't want to start something that is unsustainable" (Interview 36). Additionally, expanding social and community supports may prove more harmful. Previous experimentation with a discussion group for queer women refugees quickly backfired as participants were retraumatised by the experience. To maintain organisational sustainability and to avoid doing harm to vulnerable clients, the NGO pursues a path of inertia, maintaining minimal utilitarian service offerings for its refugee clients.

These examples reveal organisational inertia to be a 'satisficing' move, an adaptation made to be able to carry out the work of the organisation amidst resource constraints. This value-neutral conceptualisation that I offer here challenges the way in which inertia is cast in much of the literature on organisations as not only normatively 'bad' for the NGO, but one which demonstrates organisational passivity in relation to a changing environment. Based on these findings, I contend that organisational inertia may be the product of agency rather than a product of rigid organisational structures and practices which preclude the exercise of agency. Importantly, it may be an adaptation in and of itself rather than reflect a refusal to adapt. This challenges existing scholarly

understandings of organisational inertia (Hur et al., 2019; Huang et al., 2013; Geiger & Antonacopoulou, 2009; Schaeffer, 1998).

Similar to hibernation, I classify organisational inertia as an adaptation that lies on the more reactive end of the continuum (see Figure 6.1). In treating growth as temporal, organisations undertake 'just in time' adaptations, acting only when it is almost too late—when organisational growth threatens to render the group unsustainable. In resisting growth and leaving in place barriers to access, organisations choose not to act until conditions change.

In this section, I have shown that it is not the lack of work that threatens the survival of LGBT organisations in the post-same-sex marriage context. Rather, it is attempting to meet expanding LGBT needs within the bounds of sociocultural, political, and economic structures and organisational capacities. To adapt to the growth in issues, identities, and needs in a post-marriage LGBT policy domain, I find that LGBT NGOs hibernate, curtail or resist growth, and remain inert to survive. Adding to the scholarly analysis of organisational continuity, I posit that hibernation may be undertaken to manage a lack of financial resources, weak organisational capacity, or for organisational transformation to better fit an evolving policy domain. I suggest that under post-marriage conditions of resource dependence, resource availability, and resource mobilisation, doing more social good may bring the organisation closer to death.

Table 6.1: Adaptations Observed Amongst LGBT NGOs

Adaptation Type	Sub-Type	Example
Adaptations to Organisational Mission	*Mission Drift*	Shift in mission focus after achieving major goals – e.g. rights-focused EDI groups after same-sex marriage, HIV NGOs after HIV/AIDS crisis decline
	Adaptation to Mission Mandate	Adding new issues or identity groups
	Adaptation to Scale	Expanding in scale; jurisdictional blurriness
Adaptations to Organisational Form	*Professionalisation*	Acquiring charitable status
	Resisting Professionalisation	Adopting grassroots management style (e.g. horizontal management structure, issues decided by consensus vote)
	Hybrid NGO Forms	Social enterprises (NGOs with business characteristics, registered businesses with social missions)

Adaptations to Organisational Features	*Adaptation to Organisational Name*	Changing the NGO name to be more reflective of expanding identity groups in the community (e.g. from LGBT to LGBTQ or LGBTQIA2S)
	Adaptation to Language	Adapting the French language to include gender neutral pronouns
Adaptations to Organisational Frames	*Constructing and Maintaining Narratives of Organisational Success and Continued Relevance*	Using storytelling to persuasively convey to donors, beneficiaries, and supporters what the NGO does and how it has achieved its goals; reframing the function of the NGO to convey continued relevance
	Strategic Use of Frames to Negotiate Multiple Organisational Identities	Applying for funding under one organisational identity to leverage less competitive funding opportunities (e.g. a queer women's NGO applying for funding from the women's funding program instead of the overcrowded LGBT funding program)
Adaptations to Funding	*Seeking Alternative Revenue Sources*	Corporate funding
	Seeking Short-Term Sources of Individual Donations	Crowdfunding
	Building Long-Term Sources of Individual Donations	Philanthropy (e.g. fundraisers, annual giving programs, third-party solicited donations)
Adaptations to Regular Operational Levels	*Organisational Hibernation*	NGOs strategically maintaining low levels of operations out of resource scarcity or for purposes of organisational transformation
	Organisational Inertia	Resisting growth, treating growth as temporal, or leaving barriers to service access in place as a 'satisficing' move to be able to carry out the organisation's work amidst resource constraints

Maladaptations

But while intended to cope with organisational pressures and structural forces after progressive policy change, not all adaptations are beneficial to the organisation or the sector. They may instead put both parties in a more precarious position. In organisational ecology, these are considered maladaptations (Singh, 1994). Maladaptive behaviour may present short-term or long-term consequences for organisational livelihoods which may

hamper persistence, contribute to visible decline, or make continued survival nearly impossible. As management and organisational literatures show, the costs of maladaptation outweigh the advantages of adaptation such that organisations may not adapt until it is too late (Hannan & Freeman, 1977; Pfeffer, 1981; Haveman, 1992). Adaptations may not be well-thought out, resulting in adverse effects. Conversely, adaptations may be well-thought out but yield unexpected results. Resultantly, LGBT organisations may make adaptations that turn out to be counterproductive for the organisation rather than facilitate persistence. This is present in LGBT NGOs across cases and includes both proactive and reactive adaptations.

Adaptations may be maladaptive in the short-term or long-term, producing negative effects for the organisation immediately or in the long run. As I suggest, the degree of maladaptiveness also varies and may be viewed differently by different stakeholders; the impact on survival is contingent upon how the adaptation interacts with organisational and structural forces. As I outline in this section, outcomes of maladaptations include: a minor or negligible effect on organisational persistence, presenting for instance a case of 'short-term' adaptations with short-term consequences; organisational persistence is made more difficult, as illustrated in cases of short-term and long-term adaptations with long-term consequences; and a major impact on organisational livelihood, such that the maladaptive behaviour may lead to organisational death—this is illustrated in the case of 'blind alley' adaptations. I summarise these types of maladaptations in Table 6.2. Towards the end of this section, I present a case for thinking about how the NGO pursuit of an ever-expanding and more complex project of LGBT equality may in fact be maladaptive within current resource conditions.

'Short-Term' Adaptations with 'Short-Term' Consequences

This type of maladaptation is observable in many of the examples illustrating NGO adaptations to frames and their regular level of operations. This includes organisation name changes which quickly become outdated and fail to resonate with donors, and unsustainable organisational growth to meet rising service demand. These are examples of proactive and reactive adaptations executed with short-term thinking or made to respond to immediate problems. At present, the consequences for the organisation are short-term rather than long-lasting, with maladaptiveness resolved to present little impact on organisational persistence.

In the examples mentioned, the Toronto community funder made additional name changes before settling on using both the new name and the original name in official communications, solving the problem of the name change not resonating with donors. Growth in Calgary's trans youth NGO was paused with the funding shortfall; with capacity inert, the community raised emergency donations to address immediate NGO survival concerns (Pike, 2019). For Montreal's provincial-level EDI NGO, temporal growth was made a regular pattern of organisational operational activity, with services and capacity expanding and contracting according to funding availability. However, the 'short-term' nature of these consequences is inevitably temporal, as the impact of maladaptations may continue to play out over the life course of the NGO. What appears to be of short-term consequence now may continue to impact the organisation over time.

'Short-Term' Adaptations with Long-Term Consequences

Toronto's minority ethnospecific ASOs are a case of short-term adaptations with long-term consequences. As one ASO leader explained, "ASOs were supposed to be a stop-gap measure... not a long-term solution…" (Interview 53). The nature of the problem that ASOs were envisioned to address was summed up by another HIV NGO leader: "People thought [the HIV/AIDS crisis] would be a short-term problem like a plague, and that it would pass" (Interview 65). Consequently, the adaptations that HIV NGOs made to an evolving public health crisis and funding context were intended to temporarily sustain what leaders anticipated to be short-term crisis response organisations. Commonly, organisational leaders would take on whatever responsibilities were required on a day-to-day basis. Parallel to the emergence of HIV NGOs elsewhere (Chambré & Fatt, 2002), organisations scaled up rapidly to meet growing demand without the infrastructure to sustain it. There was no investment in sustainable growth because continued organisational survival (and indeed the survival of those infected with HIV) was always uncertain.

In the contemporary context, small HIV service providers, especially minority ethnospecific ASOs, continue to persist today with no middle management despite the need for it. ASO leaders continue to have mega portfolios where in addition to managing and leading the organisation, they are simultaneously the fundraiser, grant writer, human resources department, and frontline worker. This mirrors the range of activity that ASO leaders were responsible for during crisis times when ASOs operated as short-term crisis response NGOs. While this set-up may have been a necessary adaptation in an evolving crisis, long after the end of the HIV/AIDS crisis, lack of middle management impairs the

ability of the NGO to do its work. It diverts capacity within the organisation, contributing to burnout, high staff turnover, regularly strained capacity to maintain service offerings, and lack of capacity to take on new clients or respond to new needs.

But as these groups tend to operate at or beyond capacity and funding is unstable, the cost of adapting by investing in management is perceived to be too high (Hannan & Freeman, 1977; Haveman, 1992). Sparing scarce resources to adapt management structures may cause a vital resource shortage, potentially bringing the organisation closer to death. What began as a reactive adaptation to the HIV/AIDS crisis has produced a pattern of reactive adaptations at the furthest end of the reactive spectrum: not acting until it is too late. Effectively, this shows that organisational capacity and the prospects for long-term sustainability are 'imprinted,' or structured, by the crisis conditions in which the NGO emerged and subsequent crisis adaptations (Tucker, Singh, & Meinhard, 1990; Stinchcombe, 1965). This speaks to concepts of 'imprinting' in organisational ecology but also lends support for an ecological interpretation of organisational adaptation: organisations do not simply adapt when they perceive a threat to their survival, as resource dependence theory may suggest (Aldrich & Pfeffer, 1976)—rather, exercising their agency, they weigh the costs and benefits of adaptation before deciding on a course of action (Hannan et al., 2006; Oliver, 1991; Child, 1972; Hannan & Freeman, 1977). This contributes to explanations of why adaptation may not occur until it is too late: the costs are simply too high (Haveman, 1992; Hannan & Freeman, 1984).

'Long-Term' Adaptations with Long-Term Consequences

As a community development NGO in Montreal illustrates, long-term adaptations to organisational mission and frames can have long-term consequences for demand, funding, and thus survival. In a sector dominated by service- or advocacy-oriented NGOs, there is a lack of funded community spaces devoted to LGBT culture and recreation in Montreal. To fill this gap and to differentiate the organisation from its counterparts, one NGO leader modelled his organisation after 'American style' community centres present in the US and English Canada, cultivating links with and situating the NGO amongst community centres beyond Quebec. In this vein, the NGO holds social and cultural activities including board game nights, panel discussions, and documentary screenings, in addition to offering immigration and legal services. It is also home to one of ten LGBT libraries in North America.

But while there is some overlap in sociocultural and IRI offerings between the organisation and its sector counterparts, the NGO's emphasis on LGBT culture, recreation, and community space does not resonate with 'how things are done' in Quebec. With a culture and recreation framing, the NGO's mission does not align with the Quebec government's approach to achieving LGBT social equality by "solv[ing] problems" related to homophobia and transphobia (Interview 35). Moreover, the cultivation of culture and community as it pertains to a minority identity group contradicts the regional mentality and state project of promoting a single collective Québécois culture and society. The characterisation by provincial government officials of an LGBT community centre as an "American" concept and feature of American society further underscores the lack of fit with the Quebec government and its desired vision of a distinct Francophone society (Interview 35). Consequently, the NGO's mission and framing have made it difficult to negotiate additional recurring and project-based funding.

Unable to tell a compelling narrative of how his organisation fits in Quebec society, funding woes persist which preclude the NGO from being able to carry out its mission in the long-term. The NGO is relegated to a space too small for its purposes and is unable to ramp up its offerings, resulting in low demand from the community to use its services or attend events and activities. In turn, low demand affects further funding prospects. Consequently, the NGO is widely perceived in the sector and community as simply "a library and two empty rooms," reflecting a lack of legitimacy as the city's LGBT community centre (Interviews 19, 31, 20, 39). Compounding the problem is weak giving norms in Quebec: the community centre's leader admitted that while older gay men criticise the organisation for being too small and unable to meet their needs, there is no desire in the community to raise money to improve the centre. In conjunction with societal and state forces, these long-term adaptations to mission and framing therefore make long-term mission pursuit and thus survival challenging.

This case is illustrative of a long-term proactive adaptation whereby the NGO seeks to change the rules of the game, sticking by a decidedly Anglophone and American vision of the purpose of an LGBT NGO. In adhering to this long-term adaptation in an unfavourable environment, however, the organisation is left to adapt reactively to environmental threats: its leader refuses to veer off course until the survival of the NGO is at stake.

'Blind Alley' Adaptations

Adaptations may also lead the organisation down ‘blind alleys,’ a term in evolutionary theory referring to paths which lead to nowhere and have no way out (Davidson, 1993; Hildebrandt, 2015). The negative consequences are so severe that the opportunity to make subsequent adaptations for continued persistence is closed. The organisational and environmental conditions are so unfavourable that organisational death is likely. These maladaptations may therefore be difficult to observe, as the organisations may no longer exist. However, I found a case of blind alley adaptations to be observable in a major community development NGO in Calgary.

In 2015, the organisation adapted to the expansion of issues and identities and the growing prevalence of identity politics in LGBT discourse through changes in focus and service provision features. Chiefly, it adapted its mission mandate and outputs (see Chapter 5). It sought to be radical in its approach by, first, expanding the range of issues and needs it would address and meet in the community, leaving few stones unturned in its pursuit to include everyone; and second, embedding an anti-oppression approach that foregrounded identity and difference in individual experience. The latter aspect led the staff to conclude that clients could not receive standardized services (where everyone would get the same services, would receive referrals, and a common standard of practice would be observed), but required an individualized approach such that no two clients received the same type of service provision because all lived experiences are different. This was a significant departure from standardized care practices at other community development NGOs. In order to ensure that its anti-oppression philosophy was sufficiently embedded in its full range of services, it offered its programs in-house rather than partnering with community organisations with existing specialist expertise. This included offering in-house IRI support programs for people of colour, a particularly sensitive issue area.

However, without the sufficient funding, capacity, and expert resources to execute these changes and to serve vulnerable groups within the LGBT community, the organisational revamp backfired significantly. Within a year, organisational legitimacy was in tatters, with the NGO perceived by the community as overpromising and failing to meet expectations. At worst, the organisation was accused of racism and inflicting “trauma” upon beneficiaries through repeated instances of mismanagement and lack of sensitivity to issues of anti-oppression and anti-racism (Calgary LGBT community sources, 2015, p. 13). Examples of such instances include white staff members delivering anti-oppression training and sitting in on anti-racism discussions with ethnic minority participants, staff providing IRI services without sufficient expertise, and the mostly white-staffed NGO

ignoring suggestions from ethnoracial volunteers and participants. At further issue was the refusal of the NGO leadership to accept responsibility on record for what the community perceived as enacting racist practices and inflicting trauma. From the community's perspective, this was the only sufficient demonstration of accountability for its wrongdoings. But it would have exposed the NGO to legal liability, a potentially precarious situation for a registered charity under federal regulation.

The NGO's restructuring in the interests of identity politics constitutes a blind alley maladaptation. Having lost the trust of the community, NGO legitimacy was damaged, making continued organisational adaptation and survival nearly impossible. The board resigned, staff were laid off, funding was returned to donors, and its leader resigned and relocated with the stipulation that he did not want to be contacted about the organisation's implosion (CBC News, 2015; Interview 1). Facing death and with no way to salvage the organisation amidst the fallout, the NGO closed. Yet, the NGO survives today under new leadership and under the guidance of standard nonprofit management techniques—the product of moderate elements in the community, rather than the organisation itself, resurrecting the NGO months after its death.

Similar to the previous case of the 'American-style' community development NGO in Montreal, the organisation in this case sought to fundamentally change the rules of the game for a community development LGBT NGO. But in this case, the consequences of the organisation's long-term proactive adaptation were so severe that it left no room to even adapt reactively. This blind alley maladaptation closed the door to further adaptations. It did manage to alter the operational environment, but not in the way the NGO intended: The lasting damage of its former leader's and staff's decision to embrace a more radical vision of LGBT community development practice led successive management to conclude that "radical anti-oppression methods are about destroying the guts of good governance… The anti-oppression focus is about outing people. I've never seen it be used successfully anywhere" (Interview 1). The reputation of anti-oppression approaches, intersectionality, and identity politics within some circles of Calgary's LGBT NGO sector had effectively been tarnished.

Maladaptive Effects of Funding Social Good: Pursuing an Expanding Project of LGBT Social Equality Under Resource Constraints

With the ultimate goal of surviving, many of the adaptations discussed in this chapter are made in the immediate interests of resource mobilisation to satisfy increased resource

dependence (see Chapter 5). This primarily takes the form of attracting short-term project funding across state and market sources (see Chapter 4). As I contend in this final section, playing this 'funding game' with the goal of financing an expanded and more complex project of LGBT equality may have maladaptive impacts upon the LGBT NGO sector. This challenges current thinking in the literature on LGBT politics which suggests that tackling a more transformational and intersectional social justice agenda after same-sex marriage is necessarily a normatively 'good' thing in and of itself (Bernstein, 2015; Jones et al., 2018; DeFilippis et al., 2018).

As discussed in this chapter and in the previous chapters, I found LGBT NGOs to be embedded in a cycle of funding—searching for, applying for, accounting for, and making organisational adaptations in response to short-term funding. This funding game is embedded in heightened resource dependence and the structural constraints around the availability of resources and the capacity to mobilise these after policy progress. With the emergence of new LGBT programs and organisations, the effect of this 'funding game'—a repetitive cycle of short-term funding that heavily determines survival—has been not only increased competition, but the knock-on effects of inter-organisational competition: territorialism, lack of collaboration, and working in silos. These impacts are evident across cases but are more pronounced where the LGBT sector is denser, specifically in Montreal and Toronto.

Demonstrative of this funding game, unspoken rules exist around facilitating 'fair' competition. NGOs are expected to stay within the bounds of their broad issue areas—EDI, community development, health, arts and culture, and IRI—but also within the bounds of the specific issues they address under these umbrella areas. To facilitate this, I found that LGBT organisations may engage in 'mutual behaviour,' a concept from organisational ecology describing instances where organisations act in ways that benefit the survival of each other with the ultimate goal of self-preservation (Freeman, 1990). In Montreal, for instance, EDI and community development NGOs seeking to tackle the same issue may compromise by splitting the share of work, a move geared toward maintaining good interorganisational relations and delineating competitive lanes. For instance, after negotiation, inclusivity work in elderly homes was split between two organisations: one which would directly with the elders and one which would focus on educating and assisting the support workers.

But in the context of structural forces and the impacts of progressive policy change on the organisation, abiding by the rules of the funding game becomes increasingly

difficult. As discussed in Chapters 4 and 5, issues and identity groups continue to multiply and—whether motivated by the social imperative to do it all, a holistic approach to addressing social issues, the intersectional basis of social issues, or new funding opportunities—venturing beyond the NGO's designated 'lane' has become inevitable. It has also become more territorial and personal, with implications for interorganisational relations, efficacy, capacity, and sustainability in the LGBT sector.

NGO leaders across cases lament that competitors are "not good at staying in their own lane," overlapping in issue area as they expand their mandate to meeting evolving community needs (Interview 5). Venturing beyond one's lane is typically perceived by others as disingenuous in motive, infringing upon long-held territory, and taking up the mission of others with the intent to "cannibalise" funding (Interviews 24, 25). Territorial and put off by such infractions to the rules of the funding game, the LGBT sector across cases has become increasingly atomised with organisations working in silos.

Furthering this atomisation is, on the one hand, a sense of NGO efficacy in being able to fill gaps where other NGOs cannot. I suggest that this is underpinned by real or perceived 'comparative advantage'—that is, the possession of 'distinctive' capabilities enabling the NGO to meet specific needs that others cannot (see Chapter 5; Billis & Glennerster, 1998). In this vein, NGOs do not collaborate with other organisations, because they have sufficient resources and capacities to carry out the program, service, or activities—they can do what others cannot. On the other hand, NGOs are atomised because of a preoccupation with the funding game itself, where they seek to protect funding procurement strategies and have little time to network and collaborate.

Sector atomisation, a cost of the funding game, has real consequences for the provision of LGBT services and advocacy. Without sufficient inter-organisational communication, service duplication may result. Illustrative of this, three different community development organisations in Montreal genuinely believed they were the only LGBT NGOs in the sector writing letters of support and providing preparation support for refugee hearings before realising otherwise when interviewed for this thesis. Indeed, service duplication matters when ever-scarcer public and private resources are being diverted in the sector to less efficient use.

Furthermore, the costs of competition as a result of the funding game are high. Such is the state of competition that an ASO leader likened it to "the Hunger Games," of "killing other organisations" for funding (Interview 66). Governed by shifting cycles of short-term funding to meet evolving community needs, I observed that organisations have

become preoccupied with simply surviving in the immediate term. Substantive long-term planning on the part of NGOs has thus become "visionary thinking" (Interview 67).

At best, this hinders the long-term persistence of individual NGOs. At worst, it may result in a sector overpopulated by organisations with short time horizons, interfering with the survival of all. Without a clear long-term collaborative strategy over how the LGBT sector will collectively meet evolving LGBT needs as funding becomes more difficult to obtain, service duplication will become rampant with funding stretched across a sector already operating beyond its carrying capacity (see Chapter 4). Continuity of service provision and advocacy may be impacted, reducing the collective efficacy and capacity of the LGBT sector to meet community needs and pursue missions. In effect, the funding game in the LGBT sector long after same-sex marriage entails that the quest to survive for today may hamper the sustainability of all LGBT organisations in the long run.

In this vein, my findings echo those of third sector studies showing how funding constraints in the neoliberal era (see Chapter 4) can have detrimental impact on the ability of organisations to pursue more transformational, social justice-oriented goals (Feldman et al., 2017; Hasenfeld & Garrow, 2012; Ishkanian, 2014). But importantly, as I emphasise in this section and as I have shown in this thesis, it is not simply neoliberal changes to funding which are the issue: the expanding project of LGBT social equality is a factor in and of itself. Ultimately, doing as much social good as possible to achieve LGBT equality in this political economy of structural forces, organisational factors, progressive policy shift, and adaptation may be detrimental to the long-term sustainability of the LGBT sector—with broader implications for LGBT policy provision and the representation of LGBT issues and interests in civil society and social policy.

Table 6.2: Maladaptations Observed Amongst LGBT NGOs

Adaptation Type	Sub-Type	Example	
Maladaptation	*'Short-Term' Adaptations with 'Short-Term' Consequences*	Organisational name changes that do not resonate with audiences; unsustainable growth that is halted and addressed with new funding; temporal growth that is made a regular pattern of organisational operational activity	Pursuing the 'funding game' with the goal of financing an expanding project of LGBT social equality

	'Short-Term' Adaptations with Long-Term Consequences	Persistently operating with crisis-oriented management, affecting long-term organisational sustainability	
	'Long-term Adaptations with Long-term Consequences	Organisational mission and frames do not resonate with key funders, affecting long-term demand, funding, and sustainability	
	'Blind Alley' Adaptations	Organisational restructuring and entering sensitive issue areas without sufficient funding, capacity, or expert resources, which damages organisational legitimacy beyond repair. Continued survival is nearly impossible.	

Conclusion: Organisations Exercise Agency by Adapting to the Survival Pressures of Structural Forces, Policy Progress, and Organisational Factors

Using organisational ecology, resource dependence, organisational management, and development management literatures, in this chapter I have demonstrated the ways in which LGBT organisations have responded to the evolving LGBT policy domain after same-sex marriage legalisation in Canada. This chapter constructs the final component—adaptation—of the political economy framework in this thesis. In this respect, it shows how structural forces, progressive policy shift, and organisational factors can create the conditions for organisations to undergo a variety of adaptations in order to better their chances for survival. Demonstrating my conceptual framework, it shows how progressive policy shift can directly or indirectly affect organisations in a policy domain by effecting adaptations (and maladaptations) or creating the conditions for them.

In analysing the range of adaptations observed amongst participants, I have shown how LGBT organisations exercise their agency to adapt to the pressures created by structural forces, progressive policy shift itself, and organisational factors after long-term policy progress. As I noted in this chapter and in Chapter 2, agency is fundamental to how I conceptualise adaptation in this thesis and can be observed to varying degrees in the adaptations and maladaptations discussed. To recap, adaptations exist on a continuum of proactiveness and reactiveness, anticipating environmental changes and acting to get ahead of them or acting while or after they have occurred, respectively. At the furthest end of the

continuum, proactive adaptations seek to change existing institutions and conditions while at the other end, reactive adaptations do not occur until it is too late. As illustrated in this chapter, many adaptations (and maladaptations) have elements of both proactiveness and reactiveness. This is due to the iterative relationship between the organisation and its environment in which there is constant cyclical interaction: as demonstrated through many adaptations discussed in this chapter, a proactive adaptation to one factor may be reactive to another. But regardless, the practice of undertaking adaptation reflects agency in action on the part of the organisation.

I first explored adaptations to the organisational mission. I found that LGBT organisations and HIV organisations have adapted their mission when the central issue around which their mission revolves has been 'resolved.' I conceptualised mission drift as a strategic adaptation that may be undertaken for the purposes of survival. I also examined how NGOs purposely blur jurisdictional levels as an adaptation to the challenges of fulfilling broad mission mandates and scale, especially when these encounter linguistic and sociocultural barriers.

I then explored adaptations to organisational form. I illustrated how resource mobilisation and isomorphism drive NGOs across cases to obtain charitable status, a form of NGO professionalisation. But I showed how this push towards professionalisation also produces other organisational forms, including grassroots structures which resist professionalisation and hybrid entities incorporating varying levels of business characteristics. Moreover, LGBT organisations make adaptations to features such as organisational name and language of use—adaptations which may be easier said than done, illustrating the embeddedness of certain recognisable organisational features in history and culture and the constraints to LGBT discourse embedded in a gendered language. LGBT NGOs may also adapt the framing of what they do, creating narratives of success and continued relevance and, in the case of organisations with multiple identities, strategically deploying one identity frame over the other(s) to access funding.

Furthermore, I found that LGBT organisations commonly adapted their funding strategy in response to increased resource dependence and constraints in resource availability and mobilisation. I found that across cases, many small and grassroots NGOs were likeliest to avoid government funding completely in favour of corporate and individual donors, leading many of these groups to be paradoxically sustained by corporate sponsorships. As LGBT NGOs build philanthropic strategies, they confront the resource-intensive challenges of appealing to a changing donor demographic.

I also showed how LGBT organisations can adapt their regular operational levels to the challenges posed by progressive policy shift, thereby preserving organisational capacity and averting death. To demonstrate this, I introduced the new concept of organisational hibernation, an adaptation containing both reactive and proactive elements (like many of the adaptations discussed in this chapter). Observable amongst small volunteer-run organisations, this novel concept contributes to the scholarly analysis of organisational continuity. It also demonstrates that while large well-resourced organisations are often at an advantage in adapting to survival pressures, this is not always the case. Relatedly, to protect against overextending, I found that LGBT NGOs may strategically deploy inertia in their regular operational levels, treating growth as temporal, resisting it, or leaving in place barriers to service access. I conceptualised organisational inertia as a potentially beneficial adaptation to continued persistence which may be the product of agency, thus challenging existing scholarly understandings of organisational inertia and adding to scholarly analyses of organisational continuity.

But while undertaken to better the odds of survival, adaptations are not a fix-all. They may produce organisational strengths and/or weaknesses, and the benefits and costs of adaptation play out over the short-term and long-term. In fact, adaptations may result in new challenges to navigate, and may put organisation and sector in a more precarious position. Illustrative of this, I showed how these maladaptations may hamper organisational persistence. Despite being undertaken in response to environmental threats, to proactively circumvent anticipated pressures, and/or to change the rules of the game, I demonstrated how maladaptations may contribute to visible decline or make continued survival nearly impossible.

Finally, I presented a case for thinking about how pursuing a cycle of short-term funding (a ‘funding game’ embedded in resource dependence and constraints in resource availability and mobilisation) with the goal of financing an ever-expanding and more complex project of LGBT equality may in fact be a maladaptation for the LGBT NGO sector. Lending support for my conceptual and analytical frameworks (see Chapter 2), these adaptations and maladaptations show how progressive policy shift affects a range of organisations in different ways—and how organisations strategically respond in turn to navigate the structural and organisational forces of a changing policy domain.

Combining the theoretical traditions of organisational ecology, resource dependence, organisational management, and development management, the analysis in this chapter has produced new insights into the relationship between organisations and

their environment. Specifically, this theoretical and analytical approach has uncovered, first, how NGOs respond to the survival pressures that arise when they get what they want; and second, the implications of these responses at the level of the organisation and the sector. Adaptations and maladaptations are intended to better the chances of organisational survival but may have knock-on impacts for organisational legitimacy, resource dependence, and long-term sustainability. What is more, on a larger scale, impacts at the organisational level may be felt at the sector level, affecting the collective efficacy and capacity of the sector to meet community needs and pursue NGO missions. On a broader societal level, this has implications for policy provision and the political representation of group interests, especially for underrepresented groups such as LGBT communities.

In the next chapter, I conclude this thesis by linking my findings back to my research puzzle of interest: what happens when organisations get what they want? I outline some broader implications for social policy, civil society, and governance.

7. Conclusion: Getting What You Want Can Be Costly

What happens when organisations get what they want? What are the types of problems that can arise when external events advance organisational goals, and what are the factors that make this possible? In this thesis, I have answered these theoretical and empirical questions through the lens of social policy and organisational persistence, examining how progressive policy shift (one which advances an organisation's stated goals—see Chapter 2) affects organisational survival.

To do this, I examined the diverse crucial cases of LGBT NGOs in Calgary, Montreal, and Toronto in the context of long-term same-sex marriage legalisation: three cities with a range of social, political, and economic dimensions producing different organisational operational environments. I analysed a range of LGBT NGOs, including service providers—groups which we would least expect to be affected by the achievement of same-sex marriage legalisation, as their NGO goals are not directly related to political or legal advocacy. However, as I have demonstrated, by being located in the same policy domain, all LGBT NGOs within it—including service providers—are affected by same-sex marriage legalisation, as it altered the LGBT policy domain. This is the crux of my conceptual framework of how progressive policy shift affects organisations within a policy domain, which I discussed in Chapter 2.

Drawing upon the theoretical traditions of organisational management, development management, resource dependence, and organisational ecology, I showed the different ways that progressive policy shift can affect organisations within a policy domain. In doing so, and through the framework of a political economy of structural forces, progressive policy shift, organisational factors, and adaptation, I produced new analytical insights into the relationship between organisations and their environment.

In Chapter 4, I showed how long after progressive policy shift, societal, state, and market forces affect NGO resource dependence, the availability of necessary resources, and the capacity of NGOs to mobilise these resources. This analysis constructed the first part of my analytical framework. Some of these forces are pre-existing political, economic, and sociocultural structures—for instance, regionalism, government policy ecology, the role of the state as funder, political and geographic scale, and bureaucratic inertia. For example, across cases, geographic and political scale present funding barriers through scalar constraints. Bureaucratic inertia in state and state sponsored organisations can in some instances act as an environmental buffer, shielding LGBT organisations from

survival pressures—challenging existing scholarly conceptualisations of bureaucratic inertia as necessarily non-beneficial or even regressive to the organisation and to policy implementation.

Others are directly and indirectly related to progressive policy change. This is evident through examples such as the rise of contemporary identity politics in Toronto, changing giving behaviour amongst gay donors in Calgary, *Action Plan* funding in Montreal, the unmet NGO expectations of the LGBTQ2 Special Advisor and Secretariat, and the growing corporate interest in funding LGBT organisations across cases. In Montreal, for instance, *Action Plan* funding enlisting LGBT NGOs as agents of a nation-building project of LGBT social equality is a product of sociocultural, political, and economic forces: Québécois regionalism, neoliberalism, and same-sex marriage. Relying on corporate sponsorship to fund social good is embedded in a paradox that LGBT NGOs negotiate differently across cases. Moreover, as banks seek to be more strategic in their community funding, this creates resource intensive challenges for LGBT NGOs, blurring the line between cost-effective and ethical funding practice. These examples demonstrate how the interaction of structural forces with progressive policy change can heavily shape organisational sustainability. In other words, policies which advance organisational goals can subsequently affect the survival of those groups through changes to societal, state, and market structures.

In Chapter 5, I constructed the second part of my analytical framework: showing how policy progress itself can affect the sustainability of a range of organisations in a policy domain through impacts on organisational development, missions, and capacity. In doing so, I added to our understanding of the role of policy change in organisational life cycles. I showed how same-sex marriage legalisation caused many organisations to face the possibility of closure, but that it also laid the groundwork for specialist organisations to form and generalist organisations to expand their mandates. I illustrated how policy shift affects organisational persistence through routes such as mission drift (which can be benefit survival but also complicate it), exporting the mission to ‘new’ arenas, the creation of new issue areas to address, and the strategies that NGOs pursue to address these new issue areas and identity groups while satisfying multiple competing accountabilities. I also showed how progressive policy change can affect organisational capacity, presenting opportunities and constraints to the stability of human resources and the representation of certain underrepresented groups within the LGBT sector such as racialized groups, gender diverse groups, and women. Counterintuitively, in this context, reduced organisational

capacity is in large part the product of changes to the LGBT life course and citizenship manifested in changing LGBT demographics.

Importantly, I demonstrated that with greater attentiveness to within-group difference (a shift I attribute to the issues vacuum left by same-sex marriage legalisation and expanding community diversity in this period—see Chapter 4), LGBT service provision and advocacy have become more resource intensive. In the process, they have become increasingly prone to the structural forces shaping resource availability and resource mobilisation. In other words, policy progress has become a problem of resource dependence. My findings pertaining to organisational development, mission, and capacity add to our understanding of how same-sex marriage has affected LGBT politics, communities, and the organisations instrumental to them.

In Chapter 6, I constructed the final component of my analytical framework: how organisations exercise their agency to adapt to the pressures created by structural forces, progressive policy shift, and organisational factors after long-term policy progress. Using my theoretical framework, I demonstrated the types of adaptations that NGOs have undertaken to better their chances of survival in the evolving policy domain, and how these adaptations manifest in a range of LGBT organisations. Importantly, I outlined my theoretical framework for conceptualising agency as fundamental to adaptations: regardless of whether adaptations are proactive or reactive in nature, the capacity to undergo adaptations even within an environment of constraint reflects agency in action—i.e., the agency of the organisation and thereby the agency of individuals within the organisation who impact organisational action, adaptation, and survival. Highlighting agency, many of the adaptations and maladaptations I discussed contain elements of both reactive and proactive adaptation. These include adaptations to the organisational mission, such as mission drift or blurring jurisdictional levels; adaptations to organisational form such as adopting or resisting professionalisation; adaptations to organisational features such as name and language of use; adaptations to frames, such as constructing narratives of success and strategic deployment of organisational identities; and adaptations to funding, such as avoiding government funding and investing in philanthropy.

Notably, I also show how LGBT organisations can adapt their regular operational levels to the challenges posed by progressive policy shift in a bid to preserve organisational capacity and avert death—adaptations that lie on the more reactive end of the continuum. I introduced the new concept of *organisational hibernation*, in which the group operates at the lowest possible capacity while remaining an active organisation in order to conserve

resources or to undergo structural transformation. This novel concept contributes to the scholarly analysis of organisational continuity. It demonstrates that while large well-resourced organisations are often better equipped to adapt to survival pressures (see Chapter 5), this is not always the case. Relatedly, I showed that LGBT NGOs may strategically become inert to protect against overextending, treating growth as temporal, resisting it, or leaving in place barriers to service access. I offered a conceptualisation of organisational inertia as a potentially beneficial adaptation to persistence: inertia may be the product of agency rather than a lack of it, thereby challenging existing scholarly understandings of organisational inertia and advancing debates around organisational continuity.

In the end, are adaptations—such as hybrid organisational forms, mission drift, and organisational hibernation, etc.—solely the product of organisational and individual actor agency? Through the lens of my analytical framework, my analysis has shown that adaptations are driven by agency (organisational and individual), organisational factors (e.g., capacity), and the structural forces at work within the environment. These structural forces produce the conditions in the environment and within the organisation which lead to adaptive behaviour. Structural forces may also guide adaptive behaviour, producing opportunities for certain adaptations and foreclosing routes to other adaptations—for instance, the role of regionalism in facilitating or constraining the development of philanthropic funding strategies across cases.

Is an adaptive strategy essential for organisations to survive? My analysis of LGBT NGOs has shown that while adaptations may increase the chances of survival, this is not a guarantee. The benefits of adaptation to organisational persistence are temporal: they may occur in the short-term or the long-term only, after which they present more costs than benefits. Moreover, adaptive behaviour may in fact threaten organisational survival, producing organisational weaknesses in addition to or instead of strengths over time. Over the short-term and/or long-term, maladaptations may impede organisational persistence, contribute to visible decline, or make continued survival nearly impossible. Further, as I have shown, whether an organisation survives is not solely driven by adaptation or by organisational or individual actor agency. Through the lens of my analytical framework, my findings illustrate that survival is heavily shaped by structural forces that affect the availability of resources (financial or otherwise), the capacity of organisations to mobilise these resources, resource dependence, and whether the environment will be 'receptive' to an organisation's adaptive strategy.

Over the course of my analysis, my theoretical and analytical approach has uncovered, first, the types of survival pressures that can arise when environmental shifts advance NGO goals; second, how NGOs respond to the survival pressures that arise when they get what they want; and third, the implications of these responses at the level of the organisation and the sector. As noted in Chapters 1 and 3, my findings may be relevant to understanding goal attainment in NGOs/organisations pursuing discrete policy change (either wholly or initially) or pursuing missions which evolve from discrete policy issues to substantive policy areas. They may be most relevant in policy domains where the policy goal is within reach (i.e., politically and structurally feasible), and less relevant to NGOs in policy domains where the ultimate goal is far off—such as in poverty alleviation, migration, access to housing, or climate change.

These insights may further be applicable to NGOs in other jurisdictions that have gained 'pinnacle' human rights policy shifts, and may be applicable (but less directly so) to other cases where ostensibly progressive change can complicate the lives of NGOs, such as policy victories, social or political change, scientific discoveries, or the winding down of crisis situations (see Chapter 3). They can speak broadly to other types of organisations (e.g. government and private sector organisations) dealing with progressive change and issues of resource dependence, resource mobilisation, and adaptation (see Chapter 3).

Using a case study of LGBT NGOs in post-same-sex marriage Canada, this thesis makes several key contributions to the study of organisations and NGOs, social policy, Canadian politics, and LGBT politics. Pertaining to organisations and NGOs, the findings of this doctoral thesis first fill several theoretical gaps I identified in the literature. Specifically, it fills a gap in the organisational management and development management literatures in understanding what it means for organisations to get what they want: that is, when organisations get what they want, have they effectively achieved 'success' (whether measured internally or by external stakeholders)? In my analysis of LGBT organisations, I showed that organisations 'getting what they want' cannot be reduced to normative concepts of success, whether unidimensional, multidimensional, or interpretivist. Lending support for indicative scholarship, I demonstrated that it is not only success but an external shift more broadly such as policy change which can advance an organisation's stated goals, producing both beneficial and regressive outcomes for the organisation. This builds upon the work of Hildebrandt (2018), Seibel (1996), and Hager et al (1999) in extending the debate on the unintended effects of organisations getting what they want. My findings

build our empirical and theoretical understanding of goal advancement, thus advancing the study of organisations and NGOs.

Moreover, with respect to resource dependence and organisational ecology literature, how do resource dependence relationships affect processes of survival and selection? As I noted in Chapter 2, Hillman et al (2009) observe that there is little research which examines this dynamic. This thesis answers this call, specifically adding to NGO scholarship utilising resource dependence and organisational ecology traditions (Mitchell, 2014; Khieng & Dahles, 2015; Hildebrandt, 2015; Chambré & Fatt, 2002). Through the lens of my conceptual framework of how progressive policy shift affects organisations within a policy domain, my findings show how external changes which advance organisational goals have the potential to affect resource dependence relationships and therefore the competitive and survival trajectories of a range of organisations within a common domain. Notably, my novel concept of organisational hibernation and my conceptualisation of organisational inertia (and bureaucratic inertia) build theory in the study of organisational continuity on how groups may negotiate resource dependence, survival, and selection in an evolving environment.

How might social policy which is seemingly beneficial to society produce regressive outcomes? Examining the case of same-sex marriage legalisation as a progressive social policy, I have shown that policy progress can create broader structural changes which may compromise the sustainability of NGOs. In other words, social policy which is seemingly beneficial to society can produce unintended consequences for the very groups and organisations we would expect to benefit most. Insofar as the survival of NGOs is impeded, policy progress may hamper the continuity of key NGO roles in political and social governance. This includes providing key services typically associated with the welfare state, especially as service provision continues to be outsourced to the third sector for cost-saving measures (Smith & Phillips, 2016); representing the interests of societal groups in the policy process; and providing spaces for civic and social action to cultivate citizenship. These roles are particularly important for underrepresented communities such as LGBT people. This underscores the importance of understanding and continuing to study the impact of social policy on NGO sustainability, thus answering the call for greater research in this area given the growing importance of the third sector to social policy (Smith & Phillips, 2016). In this way, this thesis contributes to the study of social policy: it advances an organisational approach to the critical study of social policy by studying NGOs as routes to uncover the wide-ranging intended and unintended impact of social

policy on marginalised populations, civil society, dominant discourses, and wider society, and vice versa.

What is the role of regionalism in social organisation and in politics, particularly in cities? This thesis challenges prevailing scholarly assumptions in the study of Canadian politics that regional sociocultural and political norms are less at play in urban areas. For instance, as I noted in Chapter 4, Sayers and Stewart (2013) contend that populism and western alienation are less likely in Alberta's urban centres; relatedly, Rayside (2008) argues that the corporate makeup of Calgary makes its inhabitants less sympathetic to the morally conservative agendas characteristic of western regionalism. My findings challenge these dominant theoretical underpinnings in the study of Canadian politics, building theory around the influence of regionalism in social and political processes. By examining NGOs, my findings advance our understanding of how western regionalism and Québécois regionalism shape the behaviour of social, political, and economic actors in Canadian cities. In turn, they add to our understanding of how these regional norms affect NGO sustainability to impact upon the policy process.

Finally, what is next for LGBT politics after pinnacle rights such as same-sex marriage have been obtained? My findings offer empirical and theoretical insight into this question by demonstrating what might happen to Canadian LGBT movement and organisational politics long after same-sex marriage has been achieved. These insights may speak to other contexts, building theory around the direction of post-marriage LGBT politics. As I suggest, the strategic cohesion unifying diverse LGBT organisations toward a common goal may disappear with long-term same-sex marriage legalisation. Within the context of the funding game and an evolving LGBT policy domain, LGBT NGOs have become more numerous, more divided, and more resource competitive. Without a clear long-term collaborative strategy over how the LGBT sector will collectively meet evolving LGBT needs as funding becomes more difficult to obtain, service duplication will become rampant and scarce funding diverted as organisations focus inwardly on immediate survival. As satisfying resource dependence takes priority, the cut of the funding pie shrinks further across the sector, hampering the sustainability of all LGBT organisations and the goal of LGBT equality itself. Continuity of service provision and advocacy may consequently be impacted, reducing the collective efficacy and capacity of the LGBT sector to address, represent, and meet the post-marriage expansion of issues, identities, and needs.

Ultimately, through the lens of my analytical framework, I have shown that doing as much social good as possible to achieve LGBT equality in this political economy of structural forces, organisational factors, progressive policy shift, and adaptation may be detrimental to the long-term sustainability of the LGBT sector. The extent of heightened resource dependence also highlights the growing power asymmetry between LGBT NGOs and funders (Pfeffer, 1981), raising questions as to the level of independence LGBT NGOs maintain with respect to the types of issues and activities they pursue. The effect is that the boundaries of what is likely to be funded begin to dictate what issues are represented in the sector, and thus what is deemed as a pressing social or political issue in LGBT civil society. This echoes findings of third sector studies showing how funding constraints around producing cost-effective, measurable, tangible outcomes in the neoliberal era (see Chapter 4) can have detrimental impact on the ability of organisations to pursue more transformational, social justice-oriented goals (Feldman et al., 2017; Hasenfeld & Garrow, 2012; Ishkanian, 2014). But importantly, from an organisational management, resource dependence, and ecological perspective, it is my contention in this thesis that it is not only neoliberal changes to funding which are the issue: the expanding project of LGBT social equality is a factor in and of itself. More research needs to be done in this area as more jurisdictions around the world move from same-sex marriage to broader projects of LGBT social equality.

In the end, why do these findings matter and for whom? My findings matter for LGBT NGOs because, as I show, getting what they want may also produce dissatisfaction with key policy partners. This is illustrated in Chapter 4 with respect to the LGBTQ2 Secretariat and unmet expectations for funding. In the absence of dedicated funding as a tangible show of state support, participant perceptions of the federal LGBTQ2 Secretariat reveal an unintended consequence to the research puzzle: insofar as progressive policy change means less visible, more normalised state support—and a move away from dedicated LGBT-specific funding, which implies a special interest group status—LGBT NGOs may be less satisfied with the state the more they get what they want vis-à-vis LGBT inclusion in policy and society. In other words, getting what they want may contribute to misguided organisational and community perceptions of state indifference to LGBT issues. These perceptions are likely to be underscored by concerns around organisational continuity and may affect trust in government.

My findings matter for theory, as they raise broader theoretical questions as to whether there is an ‘optimal’ level of goal advancement or ‘success’ for NGOs and

organisations more generally given the potential to compromise sustainability. This is particularly salient if policymakers are invested in the continued persistence of these organisations. In the third sector, this tension between goal advancement and sustainability is hampered by neoliberal regimes of monitoring, accountability, and evaluation which place added pressure on performance. 'Succeeding' has become the basis for acquiring resources and surviving—but as I have demonstrated, it may just compromise survival. If policymakers want them to persist for the long-term, perhaps they want these organisations to do well but not 'too well'?

Relatedly, my findings matter for social policy because they raise questions about the costs and benefits of policy progress, as I earlier noted in this chapter. As I have shown, policy progress can create the structural and organisational conditions which exert survival pressures on NGOs within the policy domain. Given the potential for unintended consequences—i.e., NGO survival at stake—is there an optimal level or pace of policy progress beyond which such progress may do more harm than good to the sustainability of key organisations in the policy process? But where policy progress concerns human wellbeing, is organisational continuity an acceptable justification for slower policy progress? What are the ethics of managing the pace of policy change in order to ensure that the organisations which safeguard wellbeing can survive over the long-term? Alternatively, perhaps the impact of policy shift on sustainability serves the interests of maintaining an equilibrium of resources to sustain a manageable carrying capacity of organisations—in which case, death is simply an acceptable part of the organisational lifecycle.

In this vein, my findings matter for theory and practice in organisations, prompting necessary reflection around organisational continuity. When is it time to call it a day and close up shop, and when should continued survival be pursued as an objective? When do the common interests of the sector outweigh those of the organisation? How might policymakers, researchers, and NGO leaders separate rational organisational decision-making from the social desire to continue the organisation, and instrumental NGO functions from expressive functions? These are issues and questions that might inspire future investigation.

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Appendix 1: Data

Table of Interviews Conducted

A total of 77 interviews were conducted between September 2017 and May 2018 with 52 active LGBT organisations, 2 'dead' LGBT organisations (i.e. no longer active), and 3 banks for this doctoral study. The following table provides a detailed overview of these interviews, including when and where the interview took place, the interview participant's position at the organisation (if applicable), the type of organisation interviewed, as well as the organisation mandate, primary outputs, and scale (see Chapter 2). As outlined in Chapter 2, the organisation mandate specifies the issue area and identity groups that the NGO addresses/serves under its broad mission; the outputs describe the types of activities that the NGO engages in (those listed here are the organisation's primary activities, as LGBT NGOs may play multiple roles and frequently engage in a combination of activities); and the scale here delineates the jurisdictional level at which the organisation operates.

Abbreviation Key:

Org: Organisation

Reg NPO: Registered nonprofit organisation

Non-reg NPO: Non-registered nonprofit organisation

GBMSM: Gay, Bisexual, and Men Who Have Sex With Men

No.	Date	Location	Position	Org Type	Org Mandate	Primary Org Output(s)	Org Scale
1	20-Sep-17	Calgary	Leader	Charity	LGBT; community development	service provision	Local
2	25-Sep-17	Calgary	Board Member	Funder	LGBT	funding	Local
3	26-Sep-17	Calgary	Former Leader	Charity	LGBT; arts and culture, EDI, community development	service provision, culture	Local
4	27-Sep-17	Calgary	Former Member	Reg NPO	LGBT; arts and culture	culture	Local
5	27-Sep-17	Calgary	Leader	Charity	LGBT; arts and culture, EDI, community development	service provision, culture	Local
6	1-Oct-17	Calgary	Board Member	Reg NPO	LGBT; arts and culture, community development	culture, funding	Local

7	2-Oct-17	Calgary	Member	Non-reg NPO (*org no longer active)	Lesbian and Gay; EDI	advocacy	Prov
8	2-Oct-17	Calgary	Former Member	Reg NPO	LGBT; arts and culture	culture	Local
9	2-Oct-17	Calgary	Leader	Charity	LGBT; health, community development	service provision	Local
10	3-Oct-17	Calgary	Member	Charity	LGBT; health, community development	service provision	Local
11	4-Oct-17	Calgary	Researcher				
12	4-Oct-17	Calgary	Leader	Charity	Mainstream; health (HIV)	service provision	Local
13	6-Oct-17	Calgary	Former Board Member	Reg NPO	LGBT; arts and culture	culture	Local
14	6-Oct-17	Calgary	Leader	Charity	Trans, youth; health, EDI	service provision, advocacy	Provincial
15	7-Oct-17	Calgary	Member	Non-reg NPO	LGBT, ethnoracial; EDI	advocacy	Local
16	7-Oct-17	Calgary	Former Member	Charity	Mainstream; community development	service provision	Local
17	13-Oct-17	Calgary	Leader	Reg NPO	LGBT; arts and culture	culture	Local
18	17-Oct-17	Edmonton	Leader	Program	LGBT; community development	service provision	National
19	27-Oct-17	Montreal	Leader	Charity	LGBT; EDI	advocacy	Provincial
20	30-Oct-17	Montreal	Leader	Charity	LGBT; EDI	service provision	Local
21	31-Oct-17	Montreal	Leader	Reg NPO	LGBT, youth; health, community development	service provision	Provincial
22	31-Oct-17	Montreal	Leader	Reg NPO	LGBT; community development	advocacy (sector representation)	Local
23	2-Nov-17	Edmonton	CEO	Funder	Mainstream	Funding	Provincial

24	7-Nov-17	Montreal	Leader	Reg NPO	LGBT; EDI, community development	advocacy, service provision	Provincial
25	8-Nov-17	Montreal	Leader	Reg NPO	LGBT; community development	service provision	Local
26	9-Nov-17	Montreal	Leader	Reg NPO	Gender; EDI, community development	advocacy, service provision	Provincial
27	10-Nov-17	Montreal	Leader	Reg NPO	LGBT; EDI	service provision	Local
28	13-Nov-17	Montreal	Leader	Charity	LGBT; EDI, health	service provision	Provincial
29	14-Nov-17	Montreal	Leader	Reg NPO	LGBT; arts and culture	culture	Local
30	14-Nov-17	Montreal	Member	Reg NPO	LGBT; arts and culture	culture	Local
31	14-Nov-17	Montreal	Leader	Reg NPO	LGBT, ethnoracial; community development, IRI	service provision	Local
32	15-Nov-17	Montreal	Leader	Reg NPO	Queer Women; EDI	advocacy	Provincial
33	15-Nov-17	Montreal	Member	Reg NPO	Queer Women; EDI	advocacy	Provincial
34	16-Nov-17	Montreal	Leader	Charity	GBMSM; health (HIV)	service provision	Local
35	17-Nov-17	Montreal	Leader	Reg NPO	LGBT; community development, IRI	service provision	Local
36	21-Nov-17	Montreal	Leader	Reg NPO	Queer Women; community development, IRI	service provision	Local
37	24-Nov-17	Montreal	Member	Reg NPO	LGBT; EDI, community development	service provision	Local
38	27-Nov-17	Montreal	Leader	Reg NPO	LGBT; EDI, community development	professional association	Provincial
39	27-Nov-17	Montreal	Former Leader	Reg NPO	LGBT; EDI	advocacy	Provincial

40	27-Nov-17	Montreal	Board Member	Reg NPO	LGBT; EDI, community development	professional association	Provincial
41	27-Nov-17	Montreal	Board Member	Reg NPO	LGBT; EDI	advocacy	Provincial
42	28-Nov-17	Montreal	Leader	Reg NPO	LGBT; EDI	advocacy	Provincial
43	28-Nov-17	Montreal	Member	Reg NPO	LGBT; EDI	advocacy	Provincial
44	4-Dec-17	Toronto	Leader	Charity	LGBT; EDI, community development, IRI	service provision	Local
45	5-Dec-17	Toronto	Member	Charity	Mainstream; health, community development	service provision	Local
46	5-Dec-17	Toronto	Former Leader	Reg NPO	LGBT; arts and culture	culture	Local
47	6-Dec-17	Toronto	Member	Charity	LGBT; EDI, community development, IRI	service provision	Local
48	7-Dec-17	Toronto	Leader	Charity	LGBT; health	service provision	Provincial
49	11-Dec-17	Toronto	Leader	Charity	GBMSM; health (HIV)	service provision	Local
50	12-Dec-17	Toronto	Member	Charity	Mainstream; health, community development	service provision	Local
51	12-Dec-17	Toronto	Leader	Charity	LGBT; IRI	service provision	International
52	12-Dec-17	Toronto	Member	Charity	LGBT; EDI	advocacy, service provision	National
53	12-Dec-17	Toronto	Leader	Charity	LGBT, ethnoracial; health (HIV)	service provision	Local
54	19-Dec-17	Toronto	Leader	Charity	Mainstream; health	service provision	Local
55	19-Dec-17	Toronto	Leader	Reg NPO	LGBT; EDI	service provision	National
56	19-Dec-17	Toronto	Member	Reg NPO	LGBT; EDI	service provision	National
57	19-Dec-17	Toronto	Member	Reg NPO	LGBT; EDI	service provision	National

58	20-Dec-17	Toronto	Member	Funder	LGBT	funding	Local
59	20-Dec-17	Toronto	Leader	Charity	LGBT; IRI	service provision	International
60	9-Jan-18	Toronto	Leader	Reg NPO	LGBT; EDI, community development	service provision, professional association	National
61	9-Jan-18	Toronto	Leader	Reg NPO	LGBT; arts and culture	culture	Local
62	10-Jan-18	Toronto	Member	Charity	GBMSM; health (HIV)	service provision	Local
63	12-Jan-18	Toronto	Leader	Reg NPO	GBMSM; health (HIV)	sector coordination	Provincial
64	12-Jan-18	Toronto	Leader	Charity	LGBT, ethnoracial; EDI, community development	service provision, advocacy	National
65	12-Jan-18	Toronto	Leader	Charity	Mainstream; health (HIV)	service provision	Local
66	12-Jan-18	Toronto	Leader	Charity	LGBT, ethnoracial; health (HIV)	service provision	Local
67	17-Jan-18	Toronto	Board Member	Reg NPO	LGBT; community development	professional association	National
68	17-Jan-18	Toronto	Member	Charity	LGBT; EDI	advocacy, service provision	National
69	24-Jan-18	Toronto	Leader	Charity	LGBT; EDI, community development	advocacy, service provision	National
70	26-Jan-18	Toronto	Leader	Charity	LGBT; EDI	advocacy, service provision	National
71	5-Feb-18	Montreal	Leader	Business	Queer Women; arts and culture, community development	culture	Local
72	15-Feb-18	Toronto	Member	Funder	Mainstream	funding	National
73	15-Feb-18	Toronto	Member	Reg NPO (*org no longer active)	LGBT; EDI	advocacy	Provincial

74	15-Feb-18	Toronto	Leader	Non-reg NPO	LGBT; EDI	advocacy	Provincial
75	16-Feb-18	Montreal	Member	Funder	Mainstream	funding	National
76	3-May-18	Toronto	Board Member	Reg NPO	LGBT; EDI, community development	advocacy (sector representation), professional association	National
77	17-May-18	Montreal	Board Member	Non-reg NPO	Trans; EDI, community development	service provision, advocacy	National

Appendix 2: Additional Methodological Reflections

Insights from Fieldwork

Gaining Access to Corporate Interviewees

As preliminary research and key informant interviews showed, corporate funders (and Canadian banks in particular) are increasingly important to the story of LGBT NGO survival across provincial cases. As LGBT NGOs are commonly associated with a politic critical of corporations as engines of capitalism, their economic importance to LGBT NGOs appeared paradoxical—and thus particularly interesting. For this reason, and for reasons of reachability (e.g. government funders of interest could not be reached), banks were also included in my sample, where they were the main funders of interest. Interviews with diversity and inclusion managers and high-level executives in the banking sector could potentially illuminate the donor context of the growing—yet plateauing—supply of corporate funding to the LGBT sector: specifically, what prompts corporate giving to LGBT NGOs? While cognizant that these interviews may be dominated by carefully-constructed corporate narratives about LGBT giving, these corporate narratives (whose audience includes the public but also those within the organisation itself, including employees and management) would be valuable in and of themselves. Unexpectedly, the interviews were sources of sometimes brutally honest responses.

My corporate participants were first selected by banking institution, based on which banks were most frequently identified by my NGO participants as being a key corporate funder of the organisation. As I did not have any pre-existing contacts in the private sector, let alone the banking industry, I did extensive online searches of the diversity and inclusion units of each bank with the aim of finding an official to directly email about an interview request. Where possible, I emailed someone directly, but as corporate websites keep such contact details to a minimum, many emails were sent to a general diversity and inclusion unit email address. In one instance, an NGO participant generously provided the contact information for his bank funder.

For each email, I used a similar interview request script as for my NGO participants but framed it to fit the funder: after explaining who I was and what my project was about, I explained that having noticed the growing importance of the specific funder in financing LGBT NGOs in the respective city's LGBT sector, I was interested in hearing more about XXX bank's role in supporting LGBT NGOs in XXX city and province (and across

Canada if applicable). To maximise the likelihood of response, I noted that the interview would take only 15-20 minutes of their time to be conducted over the phone at a time convenient to them.

For the provincial bank participant, a chief executive of the organisation, I was able to reach the bank's corporate secretary via a direct email address listed on an internally-produced article about this participant. Not really expecting a response, I sent an email. Several weeks passed before the corporate secretary responded and offered to check the schedule of this participant for a possible phone interview. Again, I did not have much hope but to my surprise, I was chatting with the participant over the phone a couple of weeks later. Two other participants responded to my email (one responding to an email sent to a general diversity and inclusion unit address), both representing national banks. Regardless of corporate participant numbers, the willingness of corporate participants to talk to an outsider about their support of LGBT NGOs is a finding in and of itself. It illustrates the institutional desire to have their story be told, perhaps to dispel popular 'pinkwashing' interpretations. But in the contemporary context when the boundaries of the LGBT sector are becoming increasingly fuzzy, it also illustrates the desire of people within the corporate institution who genuinely believe in what the company is doing to shed some light on another avenue via which LGBT social initiatives can happen.

Conducting Interviews in English with Participants whose First Language is Not English

While I was initially concerned that English-language interviews would be an issue in Montreal, especially where English would not be the native language for many participants there, this turned out to be an unexpected benefit for my data collection. For participants who were not fully bilingual or not completely confident in their English facility (or self-conscious about French-accented English), the fact that they responded to my interview request and agreed to conduct an interview in their second language showed that they really had something to say. Indeed, some participants made it known in their email response that their English "is not perfect," before profusely apologising several times throughout the interview. One participant even conducted the interview with her bilingual co-worker whom she had asked to translate for her; at several points during the interview, both participants would Google-translate words on the spot in order to get the English translation just right. Ultimately, this also meant that in these interviews, there was no NGO jargon in participants' responses—which was an otherwise common occurrence in my interviews with Anglophone participants. Participants had to fully explain what they

meant rather than relying on NGO jargon. Such interviews elicited some of the richest, most detailed responses out of all of my field interviews.

Benefits of Conducting Interviews with No Audio Recorder in Organisational Research

In all cases, I suspect that the absence of an audio recorder helped to make my participants feel more at ease about conducting an interview in their second language, thus facilitating detailed responses. Indeed, the participant who had conducted the interview with her co-worker as translator gradually became more comfortable to the point where my interview was with two participants rather than just one.

While using field notes only was initially done out of personal preference, I found that this was additionally beneficial in doing LGBT organisational research and NGO research more generally. As LGBT NGOs periodically experience politicisation of their work, most often from those within the LGBT community, doing LGBT organisational fieldwork can be sensitive. In both Calgary and Toronto, some LGBT NGOs were recovering from organisational implosion or fighting off community challenges to their social legitimacy. During a phone interview with one such organisation, my participant pointedly asked if the interview was being recorded (even after I had assured them from the start that it was not); they explained that they had had a negative experience with an interviewer who had secretly recorded the conversation and then leaked it to the media. Such research sensitivity stemming from the nature of organisational life, LGBT or otherwise, is compounded in an NGO sector context where inter-organisational tensions and conflict are quite common (within cities and even across provincial borders), as I found in each field site. Several participants candidly described tensions and conflict with other organisations, and with specific leaders. As one Montreal participant succinctly explained, “We’re not friends with everyone” (Interview 25). Given the organisational and political context of my research, it is conceivable that participants may have been less forthcoming about these interorganisational dynamics and even suspicious about the purpose of my research.

Collecting Data on Organisational Change in an NGO sector with High Turnover

It is worth noting that while not all participants were able to answer questions about change in the organisation, accounts from other participants were able to offer a sufficiently rich window into organisational change. High NGO sector turnover often meant that the participants had only worked at the organisation for a few years—or in a

few cases, as little as a few months. For the same reason, contacting previous organisational leaders was often not feasible. Current leaders were not always in touch with previous leaders, and previous leaders did not necessarily want to be found as the terms of leader departure were not always collegial. In one case in Calgary, the previous leader had been publicly vilified as the organisation lost community legitimacy. Accordingly, my participant informed me that the individual did not want to be found—and reflective of high sector turnover, my participant departed the organisation just a month after our interview. In such cases, participants were only able to provide observations about their own period of tenure at the organisation, coupled with 'passed down' knowledge about the organisation's history.

However, some leaders and executive members served leadership or executive roles on multiple organisations simultaneously or previously, and as such were able to offer insights into each respective organisation. This was especially useful where through multiple accounts from different time periods (including before and after same-sex marriage legislation), I was able to piece together a narrative of organisational change. This complemented interviews with participants who had been at the helm of the organisation for a decade or more, and even since same-sex marriage legalisation, and were thus able to offer rich accounts of organisational change over their tenure.

The Importance of the Interview Method in Organisational Research

My fieldwork underscored the 'technical' or instrumental importance of the interview method in organisational research (Bryman, 1988). Prior to entering the field, I had initially proposed studying organisational documents (e.g. annual reports, websites) to supplement my interview data. While deep into data collection, however, it became clear that organisational documents did not always exist. For instance, not all organisations publish annual reports or financial statements—and when these organisations are not registered charities, this information is only accessible through interviews with organisational actors. But even when organisational documents were available, they were not always reliable. In one instance, a participant admitted their latest annual report includes activities which the organisation no longer does or does only on an ad hoc basis. This discrepancy between actual and reported activities illustrates the 'fit for purpose' nature of organisational documents, which tell a carefully-constructed narrative about the organisation to a specific audience; such documents 'perform' a particular iteration of the organisation. The discrepancy also shows the degree to which organisational documents

only capture a static frame of the organisation as it was at one point in the past rather than reflect what the organisation is presently doing—thereby reflecting the challenge of measuring or reporting organisational performance, as organisational performance lies ahead of the reach of measurement (Meyer, 1999).

Official figures and information on registered nonprofit organisations were difficult to come by and varied by province to province. Not all provinces have a public registry of registered nonprofit organisations: the Quebec government maintains a nonprofit registry which lists the date of incorporation, name changes, and whether the organisation is still active; the Alberta government's publicly available nonprofit registry is literally a list in an Excel spreadsheet; and in Ontario, the only existing registry is a third party-compiled PDF list published in 2014—nothing is available from the government website. Such registries/listings act as outward demonstrations that the state 'sees' registered nonprofit organisations, entities which come under provincial regulation; they also serve to make these organisations legible to society. The absence of such documents is interesting, and perhaps telling of state capacity to produce and maintain such documents—or perhaps the implicitly differential role (ideologically and/or in practice) of NGOs vis-à-vis state and market across the provinces. From a research standpoint, however, this meant that something as basic as ascertaining whether an organisation was a registered NGO could not always be ascertained until the interview itself.