

OTF Investment Summary Report
Approval of Community Investments
Prepared for the Board of Directors March 30, 2017



2016-2017 Cycle 4
OTF Granting Investments

OTF Investment Summary Report

2016-2017 Cycle 4

Introduction

This is a summary of the OTF investments for its fourth and final granting cycle under the new investment strategy in the 2016-2017 fiscal year.

In the report below, all historical comparisons are against Grow granting under the new investment strategy, unless otherwise indicated. This includes all Grow granting over the last two fiscal years.

This Investment Summary Report includes:

Schedule 1: Executive Summary Community Investments

Schedule 2: Community Investments Granting Overview and Analysis

Schedule 3: Concluding remarks

Appendix A: List of Recommend Applications Community Investments for Board Approval

Appendix B: List of Declined Applications Community Investments for Board Approval

Appendix C: List of Technical Decline Applications Community Investments

Schedule 1: Executive Summary Community Investments

1.1 Cycle Summary: Grow Investment Stream

Highlight: Increased recommendations benefitting equity-seeking groups

This cycle, we received **540 applications** requesting **\$198.9M**. Of these applications, a total of **99** for **\$34.8M** are recommended for approval. Over the next three years, these recommended investments will impact **356,000 Ontarians**. Overall, in this Fiscal Year 2016-2017 GRTs recommended **434 grants for \$76.3M, impacting 756,000 Ontarians**. These numbers rise to **638 recommended grants for \$99.1M** when Ontario 150 capital grants are included.

Overall, there is an increased proportion of recommended investments that will benefit numerous target populations. Recommended investments **benefiting diverse cultural communities represent 24.9%** of recommendations this cycle, up from 21% in the last two fiscal years. Recommended investments benefitting Indigenous and LGBTTTQ+ populations are also up considerably. Investments benefitting **Indigenous populations represents 10.5%** of total recommendations, up from 2.4%. Finally, recommendations benefitting **LGBTTTQ+ populations are 6.7%**. The \$2.3 million in recommended investments benefitting LGBTTTQ+ populations represent the first Grow investments benefitting this community. The one target population that did not see a significant increase in the share of recommended investments is the Francophone community. Only 3 of 99 recommendations are for projects that benefit the Francophone community, representing 1.7% of total recommended dollars. A cross-departmental Francophone Affinity group has investigated how to better serve the Francophone community and the Foundation will be implementing a plan to increase investments to the Francophone community based on their recommendations.

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Demand continues to be high for OTF investments. This cycle, **\$5.72 of requests were made for every \$1.00** in recommended investments. This is almost 10% greater than the demand rate of \$5.24 last fiscal year, and over \$2.00 greater than the historical demand rate of around \$3.50 requested per \$1.00 invested. This high demand rate is due to a sustained high number of applications from the non-profit sector at a time when the granting budget is lower.

Finally, we are tracking a number of results to understand what the trends are in terms of internal and external knowledge of and engagement with the new investment strategy.

- Volunteer Scoring – 97% of volunteers scored all files assigned to them this cycle. This is 121 out of the 125 volunteers that were assigned lead reviewer on at least one application.
- Alignment with Grant Result- 92% of recommended investments are aligned with the selected grant result. This is the same proportion as the last Grow cycle.
- Technical Declines – 77% of all applications received were technically eligible for OTF funds, slightly less than in previous cycles. Of all applications that were technically declined, 50% were due to misalignment with either the selected grant result or stream. This is down from over 60% last fiscal year and is indicative of greater internal and external understanding of our strategy.

The Sector Capacity Specialists, Strategy Leads, Communications department, and the Evaluation team have begun an enhanced outreach strategy that includes one-on-one coaching, and day-long forums across the province. This new outreach approach, combined with the Knowledge Management strategy and eLearning tools are continuing to work together to ensure we improve our ratio of good applications and build knowledge about our investment strategy amongst our GRT members and applicants. With more insight gleaned from our data model, these outreach and training sessions can become more targeted and impactful.

1.2 Action Area Summaries and Noteworthy Grants

OTF continues to receive many strong applications and make excellent granting recommendations across all Action Areas. A series of internal and external outreach and information sessions, as well as continued internal learning opportunities on the investment strategy has had a strong impact on ensuring the strongest grants in each Action Area are made. The data analysis shows us that across all Action Areas, staff and volunteers are recommending high quality grants with strong alignment to our strategy and evidence of efficacy.

Active People

Recommended investments this year in the Active People Action Area are expected to result in over 20,000 Ontarians leading more physically active lifestyles. In this cycle in particular, there were two notable trends in recommended investments, both targeting the health and well-being of

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children and youth. They are: (1) comprehensive community-wide strategies to increase physical literacy, and (2) increasing physical activity and building confidence, resilience and independence through unstructured risky/adventure play.

Physical literacy provides the confidence, skills and motivation to be active throughout an individual's life. This is embodied by an investment to Sportlink - the Greater Sudbury Sport Council, to train and mentor 1600 community staff and 200 volunteers to assess and deliver evidence-based, high quality physical literacy programs in four sectors: Education, Sport & Recreation, Health and Early Childhood Education.

Connected People

A quarter of recommendations this cycle are for initiatives focused on reducing social isolation and harnessing the diversity in community to build a sense of belonging. These recommendations are expected to impact the lives of almost 50,000 Ontarians. A continuing theme is the widespread focus on addressing the causes and impacts of social isolation. There is a strong recognition of the impact of social isolation on an aging demographic and a growing newcomer population, among others. Also worthy of note is the transition of a number of successful pilots funded in previous SEED rounds to scaled up, evidence based initiatives in this GROW round.

The increasing role of engaged and organized community members in building strong neighbourhoods is also emerging as a theme in this action area. This can be seen in the implementation of a number Sustainable Neighbourhood Action Plans whose impacts straddle multiple action areas. One example is Green UP's NeighborPLAN project which scales up the Active Neighbourhoods Canada project in three new neighbourhoods in the Peterborough area. NeighborPLAN applies a tested model of deep community engagement and intersectional capacity building to strengthen social and physical infrastructure in a sustainable way.

Green People

This granting cycle, OTF recommends nine Grow grants in the Green People Action Area, representing 9% of the total recommendations. Grants recommended for approval are fairly evenly split across the two Priority Outcomes, and address all five of the Grant Results. Overall this year, recommendations in Green People will impact the lives of over 270,000 Ontarians.

Notable this cycle are efforts to apply science and evidence-based approaches to advance conservation and restoration planning. This is exemplified by a project by the Lake Scugog Stewards in Durham, who are undertaking a local, citizen-driven study of the environmental changes occurring in Lake Scugog in order to identify the causes of an alarming decline in walleye, an ecologically and economically important species. By applying evidence-based practices to assess a wide variety of aspects of the lake, in varying habitats, throughout all four seasons of the year, the organization will develop the first complete picture of ongoing stressors in Lake Scugog and the threats to walleye. This will enable the development and implementation of the most appropriate and sustainable conservation and restoration activities, by both fisheries managers and the

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community and lakeside dwellers. Such approaches are critical to ensuring that the results of conservation and restoration activities are effective and long-lasting.

Inspired People

The Inspired People action area accounts for 12% of the grants recommended for funding in this granting cycle impacting over 300,000 people across the province. Of that investment, 30% will fund the transfer of skills and knowledge to the next generation of artistic leaders, 54% will fund increasing access to arts based learning and compelling artistic, cultural and heritage experiences and 11% will fund the preservation and animation of cultural heritage.

A great example of an investment in the transfer of skills and knowledge to the next generation of artistic leaders is being led by imagiNATIVE/The Centre for Aboriginal Media, an organization dedicated to Indigenous media arts and artists. Through this 2 year investment in Toronto, imagiNATIVE will grow its professional development opportunities for First Nations, Metis, and Inuit (FNMI) screen content creators by offering year-round panels, workshops, residencies, commissions, networking events, masterclasses and labs. By increasing FNMI artists' access to Indigenous focused resources, skills and training at all stages of their careers, they will fill a void in the current landscape for Indigenous-specific professional development initiatives in media arts. Over 550 indigenous artists will be positively impacted by this investment.

Promising Young People

Promising Young People recommendations will support more than 50,000 children and youth across Ontario over the next three years. Initiatives that surfaced as the strongest target low income, LGBTTQ+, Indigenous and newcomer children and youth. A majority of these initiatives focus on developing social emotional strengths in children and youth by supporting strong and healthy relationships, connecting children and nature, incorporating mentorship with caring adults, and providing in-school and after school programming.

One of these notable initiatives is the 'Girlz Unplugged' program of the Muskoka YWCA. Girlz Unplugged will provide over 300 girls in grades 5-7 with a confidence and self-esteem skill building program. This 12 week evidence based program will run in 17 elementary schools across Muskoka. The goals of the program are to increase connection to oneself, others and community, and develop confidence, critical thinking, resilience, and pro-social relationships. Pre and post survey results for the Girlz Unplugged program shows a statistically significant increase amongst participants in the areas of self-confidence, connectedness, critical thinking and improved attitude toward school. Other areas where increase was also seen were in pro-social behaviours and communication skills. The Girlz Unplugged curriculum is aligned with the Ministry of Education's grade 5 & 6 level outcomes for healthy active living and social skills development and supports the 'Feed All Four' campaign for healthy child development and well-

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being. In a region with little public transportation, school-located programs provide for an accessible and safe opportunity for girls to come together with a caring adult.

Prosperous People

Prosperous People recommendations will support over 62,000 people who are economically vulnerable over the next three years. In this granting cycle, OTF supported a number of innovative approaches that supported employment for people with disabilities and various business process models from idea to start-up.

One of these notable initiatives is the Regional Business Hub with Muskoka Futures Community Development Corporation for rural entrepreneurs to start up and scale their businesses. Small Businesses are the driver of the economy across Canada, and in particular in rural communities. Through this program, Muskoka Futures will consolidate access to business services through physical and virtual spaces, offer programs and services to include specific business process models, and increase access to valuable coaches and mentors. External evidence indicates that less formal interactions such as co-working and "collisions" with advisors play a key role in business growth. The Hub model will invite coaches, mentors and other business service providers (public and private sector) to be present. Businesses will also be invited to work from the Hub, or simply drop in, and may interact with the coaches/mentors/providers in attendance. Accessing expertise (coaching, professional services) is proven to significantly improve a business' success and growth. Muskoka Futures will provide each business up to 50% reimbursement on the first 25 hours of coaching accessed through their program. Businesses gain first-hand experience with expertise and see the return on investment.

1.3 Sign-Offs

Sign-Off from Chairs: Each GRT Chair has signed off on the final list of grants recommended by the GRT.

Compliance with OTF Policy: The CEO has met with the Vice-President, Community Investments, and the Vice-President, Partnerships and Knowledge to review granting policy compliance. The CEO confirms that all recommended grants are within the granting policies of the Foundation.

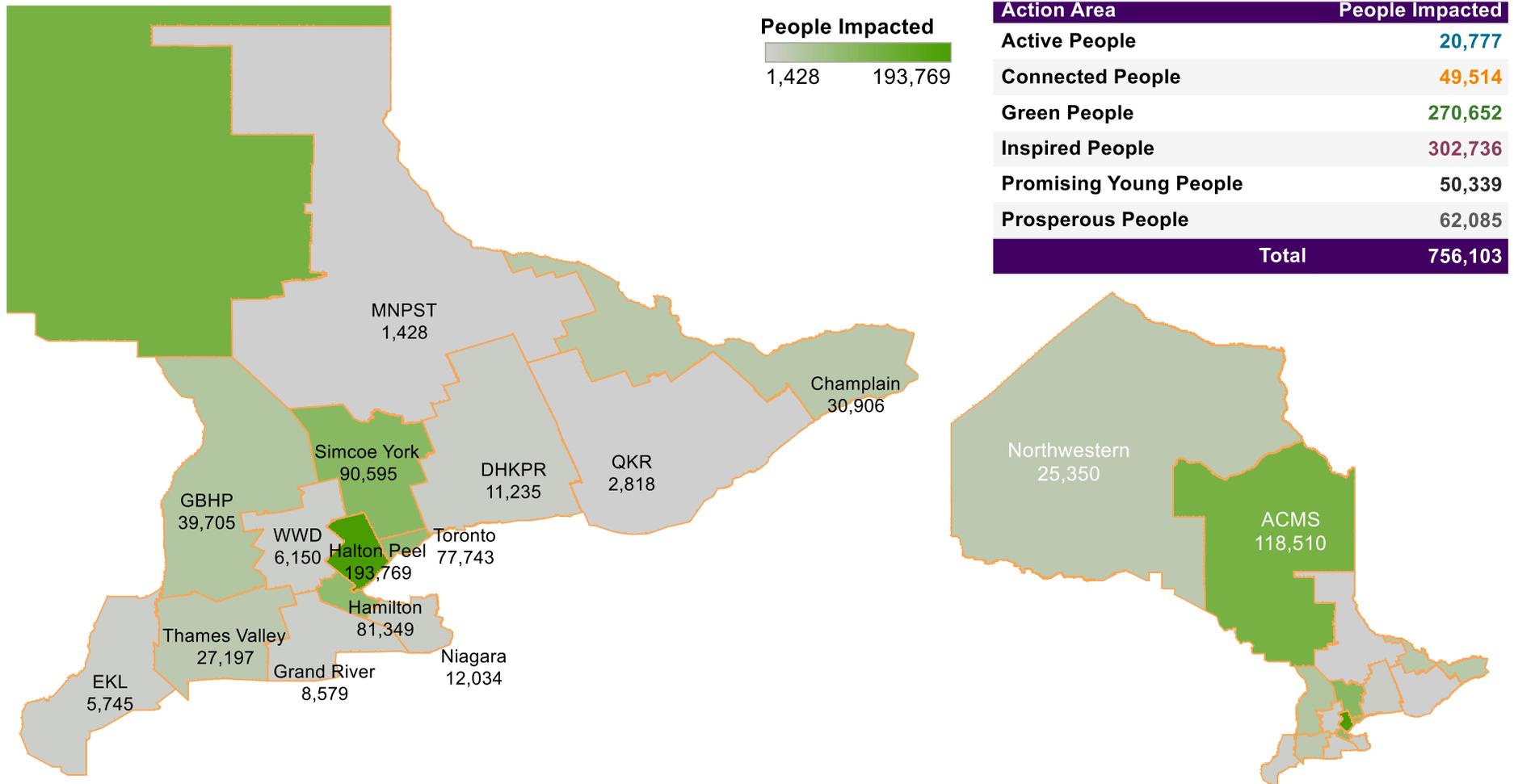
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Schedule 2: Community Investments Granting Overview

2.1 People Impacted in the next 3 years through Grow Grants

Investments in Grow stream projects this year are expected to improve the lives of over **750,000 Ontarians** over the next 3 years. This number includes over **270,000 people** that will take deliberate action to benefit the environment, more than **300,000 people** that will access arts-based learning opportunities, and over **60,000 economically vulnerable people** who will be able to meet their basic needs. Almost 150,000 people in Northern Ontario will be impacted by Grow investments this year.

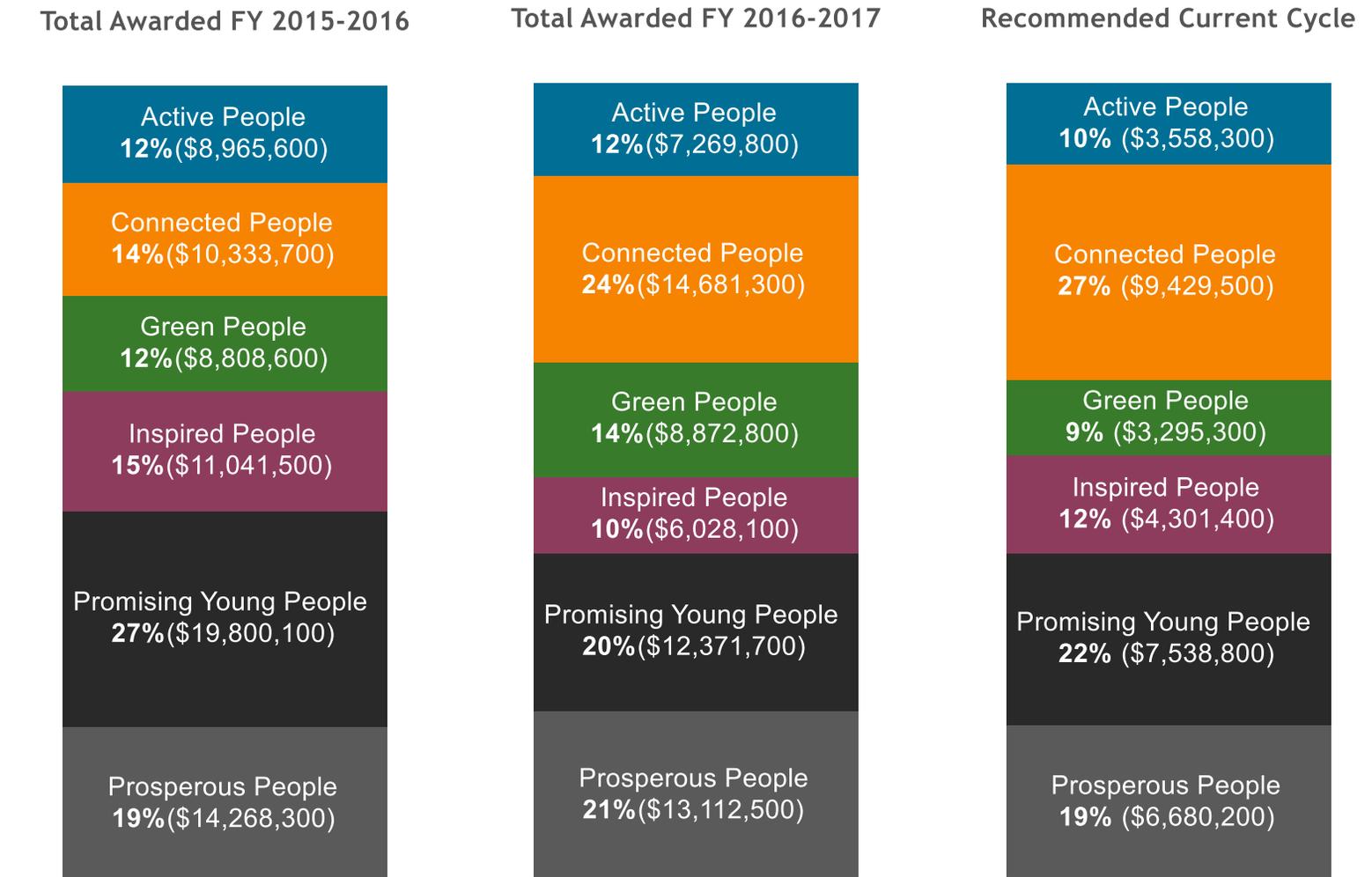


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2.2 Action Area Overview

Recommended investments across Action Areas remained mostly similar to this fiscal year. The one exception is that recommendations in Green People, as a share of total recommendations, have decreased by a third from this fiscal year as a whole. The last Grow Cycle saw a large investment in Green People, and so this decrease is likely a return to more historically typical levels. Looking at this fiscal year as a whole, there has been a large increase in recommendations in Connected People, from 14% of Grow investments last fiscal year to 24% this year (and 27% this cycle).



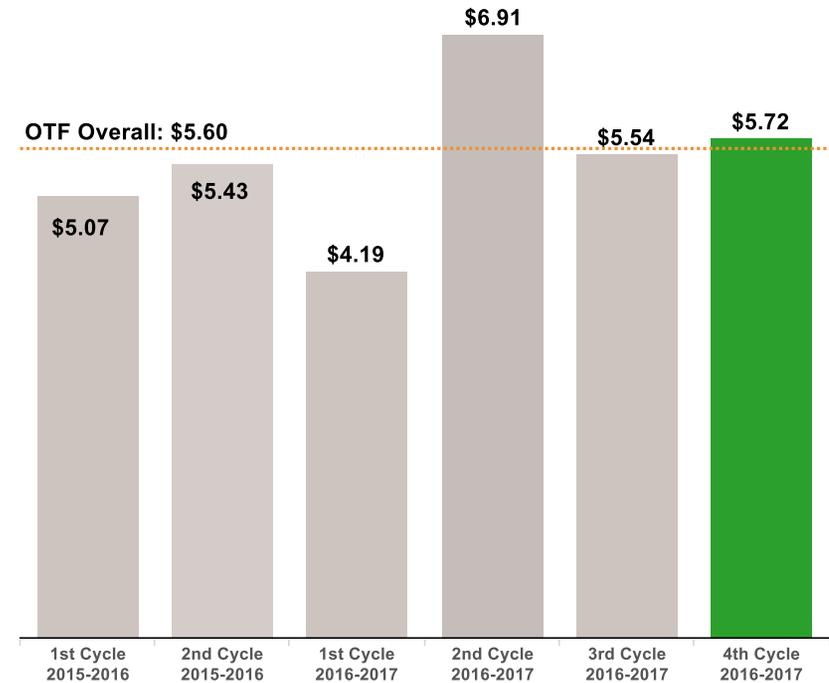
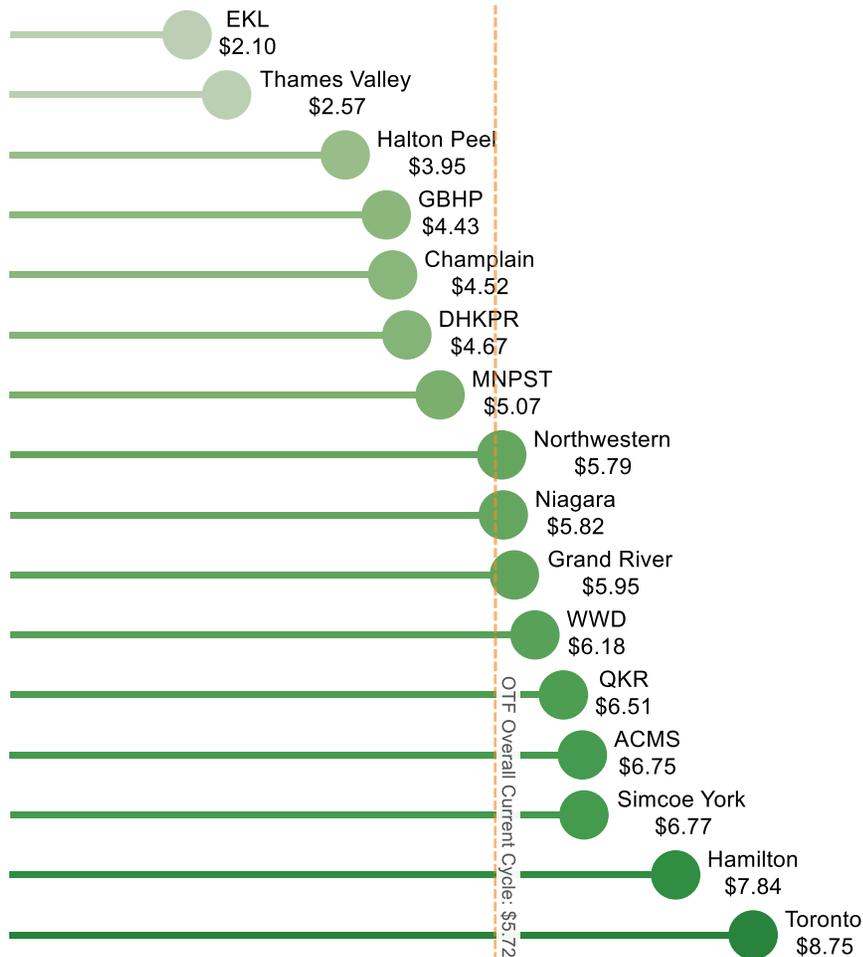
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2.4 Application Demand

Demand, at \$5.72 per dollar requested, continues to be at historically high levels. In the years before Redesign, demand tended to be in the \$3.50 range. In the first year of the new investment strategy, this rose to over \$5.00 per dollar requested. Now, in the second year of Redesign, this is the second cycle in which demand is close to or greater than \$6.00 per dollar requested. This historically high demand is due to sustained high levels of applications and a reduced granting budget. In terms of geographic distribution, the southwestern catchments of Essex, Kent, Lambton and Thames Valley both have demand rates below \$3.00, while Toronto and Hamilton have demand rates above \$7.50.

Dollars Requested vs. Dollars Recommended Current Cycle



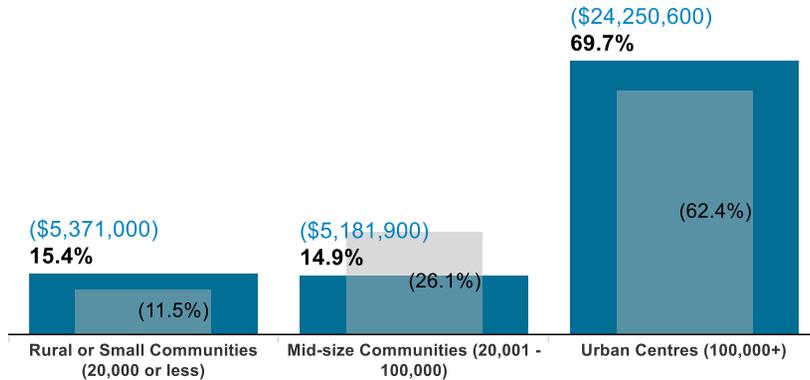
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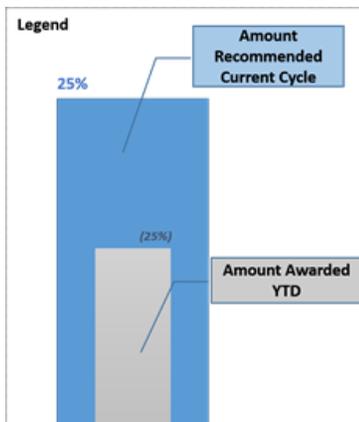
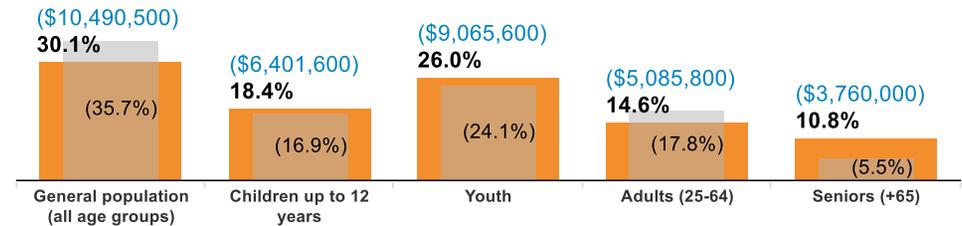
2.5.1 Investment Equity – Populations

This cycle, recommended investments benefitting both LGBTTQ+ and Indigenous populations have increased. Recommended investments benefitting LGBTTQ+ populations are 6.7% of total. These are the first Grow investments benefitting this population under the new investment strategy. Similarly, 2.4% of previous Grow investments have benefited Indigenous populations, as compared to 10.5% this cycle. Recommendations to Francophone groups are 1.7% of total, below the 4.8% Francophone population share in the province. OTF has established a Francophone Affinity group to address continued under-investment in projects benefitting the Francophone population. Recommendations benefitting Children and Youth account for almost 50% of total recommendations. Much of this stems from Active People recommendations that benefit children.

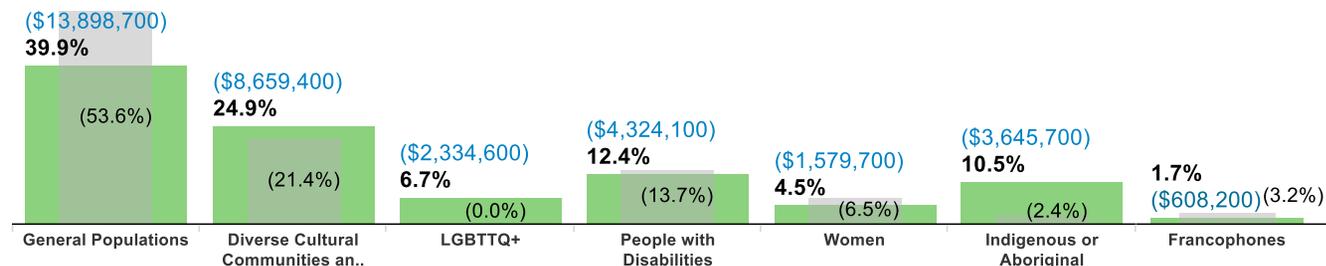
Recommended Dollars By Community Size Current Cycle



Recommended Dollars By Age Group



Recommended Dollars By Population Served

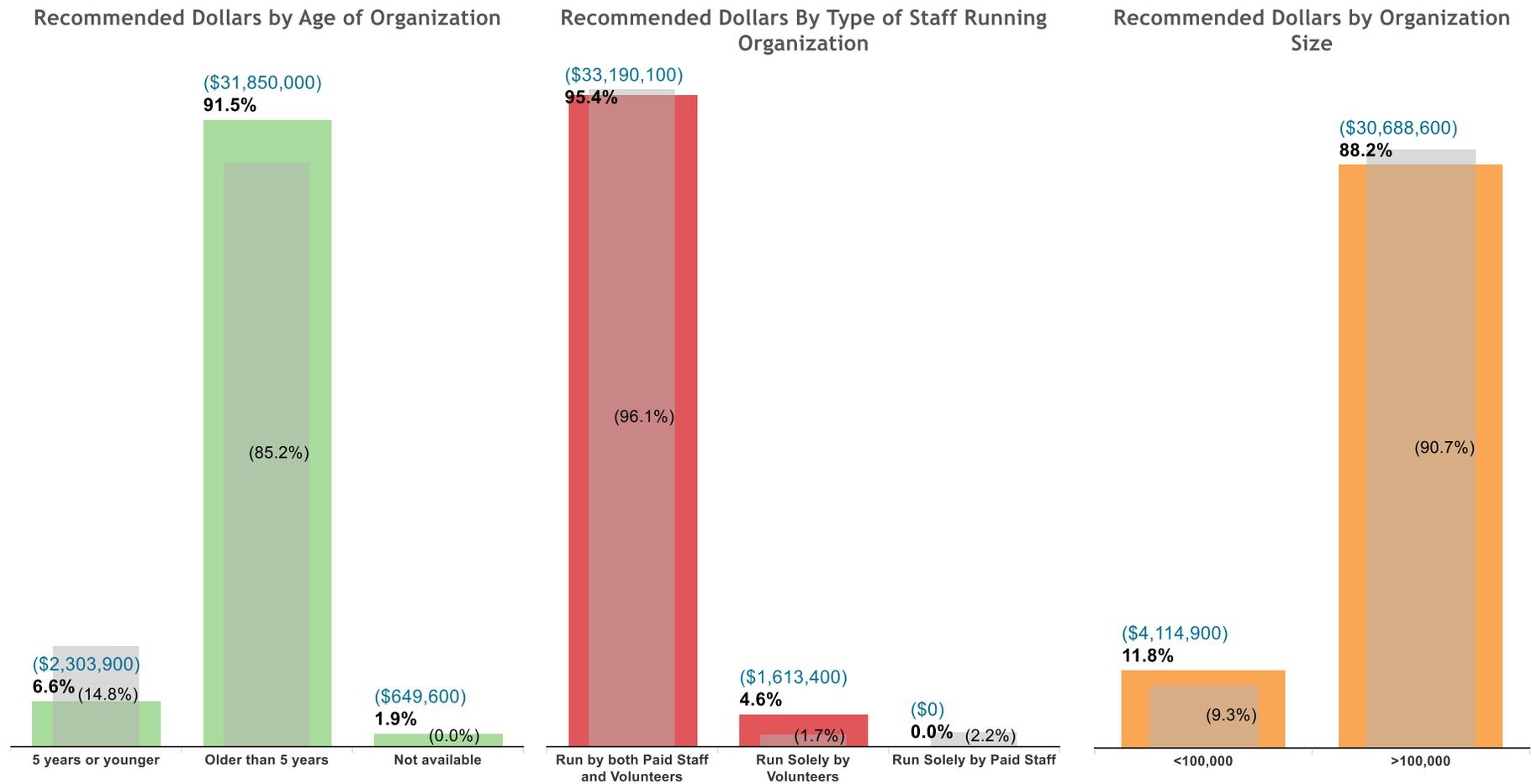


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2.5.2 Investment Equity – Organizations

As has happened historically, over 85% of recommended investments are going to large and/or established organizations. This cycle, there is a significant drop in recommendations going to young organizations (from 14.8% to 6.6%), but an increase in recommendations going to both volunteer-run (1.7% to 4.6%) and small organizations (9.3% to 11.8%). The increase in recommendations to volunteer-run organizations is stemming mostly from increases in catchments surrounding Toronto (Simcoe York, Halton Peel, and DHKPR), while the increase in recommendations to small organizations stems mostly from increases in the Northern catchments (ACMS, MNPST, and Northwestern).



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3.0 Concluding Remarks

This OTF Investment Summary Report outlines key highlights and insights from this cycle of recommended investments and attempts to provide context to what the data is telling us so we can make evidence based decisions as we move forward. With **\$76.3M in investments**, the impact of the recommended grants is expected to be felt by **756,000 Ontarians** who will be able to enjoy the outcomes of more than 434 grants made this fiscal year. This includes over 270,000 people who will support a healthy and sustainable environment, over 300,000 whose lives will be enriched through engagement with arts, culture, and heritage, and over 60,000 who will see improved economic wellbeing. These types of results combined with our strong commitment to a learning agenda will enable OTF to lead in evidence based decision making and knowledge sharing.

Being able to report on the expected outcomes of OTF's investments has been truly a collaborative effort between Community Investments, IT, the Strategy Leads, Public Affairs, and Measurement, Evaluation and Learning. The ability to analyze our investments and be able to understand patterns, opportunities and challenges as they relate to our strategy places OTF in a significant position of leadership in the sector. We could not do this type of analysis without having designed the granting processes, methodology, measurement approach and data model with intent and leading edge best practices.