

OTF Investment Summary Report 2024/2025 Grow Cycle

Prepared for the Board of Directors,
February 13, 2025
2024-2025 Grow Cycle (November 7, 2024 deadline)
Ontario Trillium Foundation Community Investments

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Introduction

Ontario's non-profit sector has a significant impact on the Ontarians they serve to ensure our communities are healthy and vibrant. OTF's Grow stream is designed to fund the projects of non-profit organizations that expand, improve, or adapt programs or services with proven success over 2-3 years to drive greater impact in communities across Ontario. This stream is available to organizations working in the sports/recreation, arts/culture, environment, or human social services sectors that deliver programs or services in any one of OTF's six Funding Priorities.

The Grow stream is designed to fund projects that help these organizations scale and improve established programs and services that have a proven track record of success. Eligible organizations can apply for grants between \$100,000 and \$600,000 over two or three years in support of projects that:

- Expand an existing program or service
- Improve and existing program or service
- Adapt an existing program or service

This report will provide an overview of the Grow funding round for the 2024/2025 fiscal year.

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Schedule 1: Executive Summary

1.1 Cycle highlights:

- This round, **1,797 applications** were received **requesting \$663.9M** in funding.
 - This represents a 66% increase in applications and 44% increase in dollars requested from the previous Grow round in 2019/20 fiscal year when 1,080 applications were received requesting \$459.7M.
- Overall, the **demand rate was \$14.67**, more than 2x that of the previous Grow round in 2019/20 fiscal year which had a demand rate of \$6.83. Notable given the upper limit of Grow grants was reduced from \$750,000 in 2019/20 to \$600,000 in 2024/25.
- **140 grants** valued at **\$45.2M** are recommended for approval.
 - This represents \$22.0M lower investment than the previous Grow round in 2019/20 fiscal year in which \$67.3M was invested in 170 Seed grants.
 - *NOTE: Allocations to each granting stream were set by the Grant Review Teams for each catchment based on Board approved targets.*
- The **approval rate was 8%**, representing a reduction by half from the approval rate in Grow 2019/20 fiscal year (16%), due to the higher demand and smaller amount available for disbursement in this round compared to the previous.
- Of the total applications submitted, 690 applications (38%) met OTF eligibility criteria. Of those, 295 (16%) met stream qualifications and were reviewed by GRT, after which **155 (9%) were below the funding threshold** – representing feasible projects that were not funded due to lack of funds. 1,107 applications (62%) were declined due to basic ineligibility.
- Projects serving a community falling into a **Lived-Experience demographic represented 51% of the funds recommended** for approval, while **17% of funds are serving a particular identity group, 17% supporting a specific Language group and 9% supporting a specific Gender group.**
- **4% of the funding recommended for approval was to very small organizations** with annual budgets <\$100k, while an additional **23% were to small organizations** with annual budgets between \$100-500k – this is in line with the previous round of Grow.
- **91% of Grant Review Team volunteers scored all their assigned applications**, in line with this fiscal other granting rounds (Capital – 85%, Seed – 86%), suggesting a consistently high engagement and commitment from volunteers.

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1.2 Sign-Offs

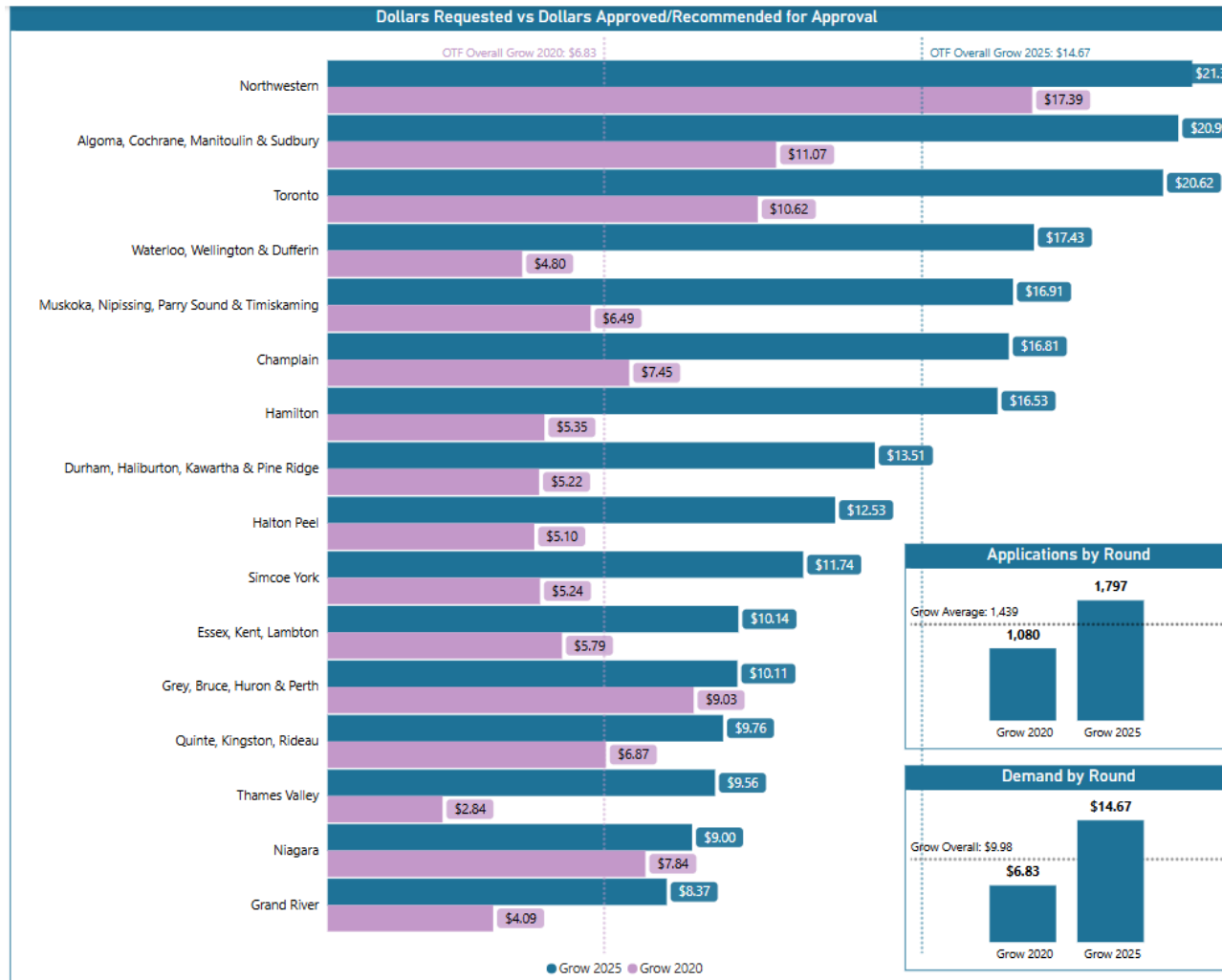
Sign-Off from Chairs: Following each GRT meeting the Chair or Acting Chair signed off on the recommendations of their GRT.

Compliance with OTF Policy: During and following the application assessment period and the GRT meeting period, the Vice-President, Granting has reviewed granting policy compliance, compliance with objectives of the funding stream, and granting process compliance with Regional Directors. The VP, Granting and CEO of OTF each also attended three GRT meetings. The VP, Granting confirms that all recommended grants are within the granting policies, stream expectations and grant-making processes of the Foundation. As well, the VP, Granting confirms that to date no new information has surfaced that would suggest the need to alter any of the current recommendations made by the 16 GRTs.

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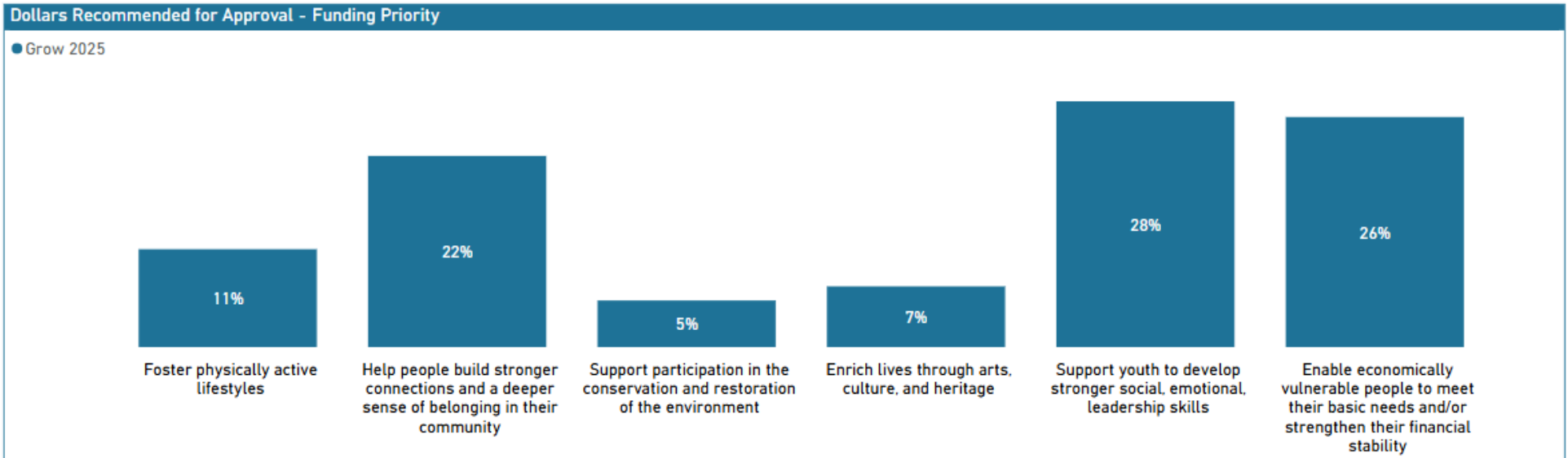
Schedule 2: Supporting Figures

2.1 Demand Overview



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2.2 Funding Priorities



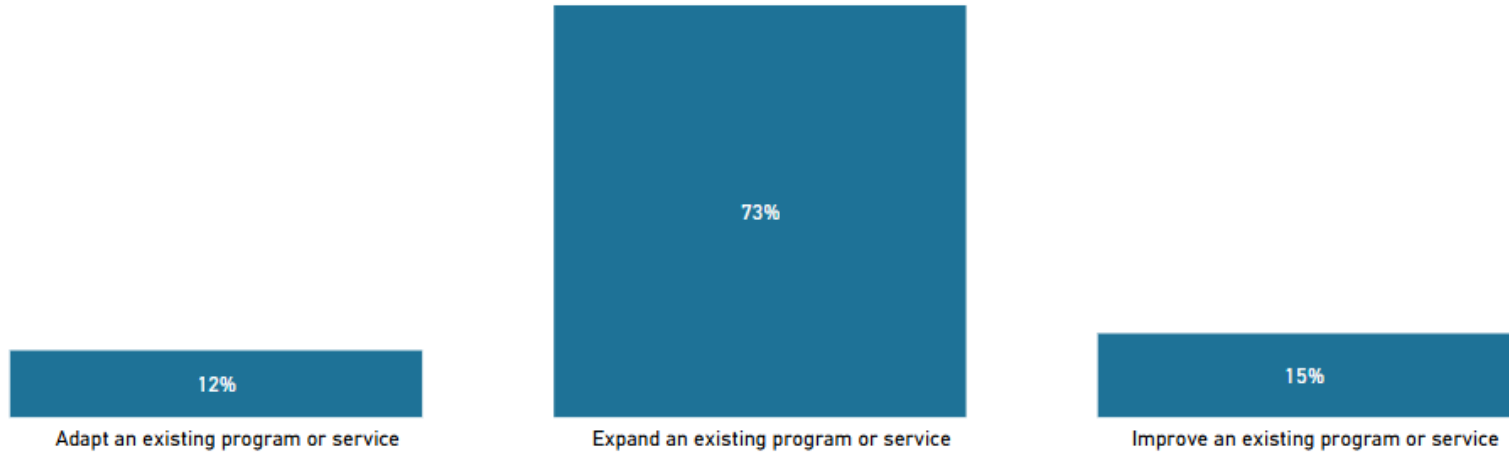
Funding Priority	Applications Recommended for Approval	Amount Recommended for Approval
Foster physically active lifestyles	18	\$5,081,400
Help people build stronger connections and a deeper sense of belonging in their community	29	\$9,919,300
Support participation in the conservation and restoration of the environment	7	\$2,415,800
Enrich lives through arts, culture, and heritage	13	\$3,151,300
Support youth to develop stronger social, emotional, leadership skills	38	\$12,755,000
Enable economically vulnerable people to meet their basic needs and/or strengthen their financial stability	35	\$11,937,200

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2.3 Project Objective

Millions Recommended for Approval - Project Objective

Grow 2025



Project Objective	Applications Recommended for Approval	Amount Recommended for Approval
Adapt an existing program or service	15	\$5,371,700
Expand an existing program or service	105	\$33,149,400
Improve an existing program or service	20	\$6,738,900