

# OTF Investment Summary Report 2018/2019 GROW Cycle



Prepared for the Board of Directors, September 27, 2018  
2018-2019 GROW Cycle  
OTF Granting Investments

# OTF Investment Summary Report

2018/2019 GROW Cycle

## Introduction

This is a summary of the Grant Review Team recommendations for GROW stream investments for the 2018-2019 Fiscal Year.

In this report, we make comparisons against GROW cycle trends in previous Fiscal Years (excluding Provincial Impact) - dating back to 2015-2016.

This report includes:

Schedule 1: Executive Summary

Schedule 2: Community Investments Overview and Analysis

Appendix A: List of Recommended Applications for Board Approval

Appendix B: List of Declined Applications for Board Approval

Appendix C: List of Technically Declined Applications

## Schedule 1: Executive Summary

### 1.1 Highlight: Record high technical eligibility

This cycle, **87% of all submitted GROW applications were deemed technically eligible for funding**. This is a **record high for the stream**, with a previous overall technical eligibility rate of 73% and 77% in the last two GROW cycles. Improvements are largely due to a concerted effort by outreach staff to improve applicants' knowledge and understanding of OTF's investment strategy and policies, through increased application support and more targeted sessions on grant alignment with the strategy.

### 1.2 Cycle Summary: GROW Investment Stream

**686 applications requesting \$282.3 M<sup>1</sup>** were received this GROW cycle, of which **141 grants for \$57.9M have been recommended for approval**. Volunteers were actively engaged in the assessment process, demonstrated with a 98% completion rate of scoring activities for the cycle. The demand for funding increased from last cycle, edging it closer to the overall average of the last 3 years, at **\$4.87 requested for every dollar recommended**. The Northern-most catchments represent the highest demand for funding with an average demand rate over \$8.50. The Green People Action Area, with only 15% of recommended dollars is forecasted to impact close to over 190,000 Ontarians – 46% of the **417,437 Ontarians** expected to be impacted through all the recommended grants this cycle.

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<sup>1</sup> There were previously 687 applications requesting \$283 M. As of 8/31/2018, Carizon Family and Community Services (GW103251) has withdrawn its application for \$698,700.

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**More than a quarter of recommended investments are benefitting diverse and cultural communities**, and more money has been earmarked for grants supporting youth and seniors, than in the previous Fiscal Year.

Larger, longer grants continue to be recommended, with **the average grant request at \$411,063 and the average grant term at 34 months**, compared to an average of \$369, 864 last year for 34 months, as well. Finally, newer organizations and smaller organizations are receiving increased investments, compared to last Fiscal Year, with a 4.2 percentage-point increase for new organizations and 4.3 for those with annual revenues of less than \$100,000. While small, there is a 0.3 percentage point increase in recommended investments towards volunteer-run organizations, bringing it up to 1.5% of this cycle's total share of funds.

## 1.4 Action Area Noteworthy Grants

### Active People

This cycle, **\$4.56 M has been recommended to support more active lifestyles for 9,741 Ontarians**. Over 60% of the programming is targeted towards children and youth, encouraging more active lifestyles, earlier in one's life - for longer impact.

The scaling up of the **Capital Kids** recreational community tennis program in Ottawa will ensure an additional 2100 children and youth from low-income and culturally diverse communities gain access to high quality tennis instruction for increasing physical activity. The program will result in 8 new sites being launched, the addition of winter-based programming and increased opportunities to develop further skills with competitive match plays. The Ontario Tennis Association has demonstrated success in its previous work engaging this target population of children and youth, including an ability to address common barriers to participation in tennis such as cost, transportation, equipment and awareness of the sport.

### Connected People

One quarter of this cycle's recommended **Connected People projects aim to strengthen the social networks of 46,839 people with \$13.13M of funding**.

Through a 3-year investment of \$279,300, the **London Community Woodshop** (LCW) will expand their proven model and triple the number of therapeutic woodworking activities offered. A traditionally hard to reach and isolated group of 500 senior males will be engaged in sharing their woodworking skills with over 3000 participants of all ages; These activities will encourage the seniors to: form new social connections based on shared woodworking interests; find meaningful occupation through mentoring (teaching and learning new skills); make wooden projects that give back to community groups; and create wooden items to sell.

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## Green People

**With \$8.55M, 191,974 Ontarians will be encouraged to support a healthy and sustainable environment**, through grants to organizations like Alus Norfolk. **Alus Norfolk** will engage 135 people in rural Haldimand and Norfolk Counties, including students, the agricultural community and other local stakeholders to participate in ecosystem conservation and restoration efforts in the bio-diverse Carolinian region, to collaboratively restore marginal farmlands to contribute to a healthier environment where more ecosystems are protected and restored.

## Inspired People

**\$8.53M has been recommended to inspire 96,017 people within the province.**

**The Ontario Archaeological Society**, which is one of the recommended grantees this cycle, will train 72 Indigenous youth as archaeological monitors in First Nation communities in the Anishinabek Nation territory including greater Sudbury, Manitoulin Island, northern Georgian Bay, and the north shores of Lake Huron and Lake Ontario. Training will respect archeological cultural practices and adhere to the Ontario Ministry of Culture, Tourism and Sport's recommendations regarding engaging Aboriginal communities in archaeology. With \$270,000 over 24 months, better trained monitors will result in a deeper understanding of archaeological heritage, and an improved ability to preserve and animate heritage through community dialogue about archaeological resources in their traditional territories. The investment will connect more people with culture and heritage; enriching their lives through greater preservation of Indigenous archaeological sites in ways that are deemed appropriate by Indigenous communities.

## Promising Young People

This cycle, **\$12.48M has been recommended for grants that will impact 28,486 children, youth, and parents in the province.**

**Big Brothers Big Sisters of Guelph** will help 384 at-risk children to become enrolled in a proven in-school mentoring program model, that supports kids to develop the social and emotional skills needed to mature into civic leaders and successful adults.

## Prosperous People

**The \$10.70M recommended this cycle will help to promote the economic well being of 44,380 members of the community.**

One of the recommended grants, **NPower**, will scale up their existing program and engage 180 low-income youth aged 18-29 into sustainable technology careers. This will be done through the provision of free technical and professional training, job placement and post hire support to their participants. Enhancing people's economic wellbeing, this initiative is helping people become and stay employed while meeting the technology labour demands of employers in Mississauga, Brampton and Caledon.

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## 1.5 Sign-Offs

Sign-Off from Chairs: Each GRT Chair or Acting Chair has signed off on the recommendations of their GRT.

Compliance with OTF Policy: The Vice-President, Community Investments has reviewed granting policy compliance. The VP, Community Investments confirms that all recommended grants are within the granting policies of the Foundation.

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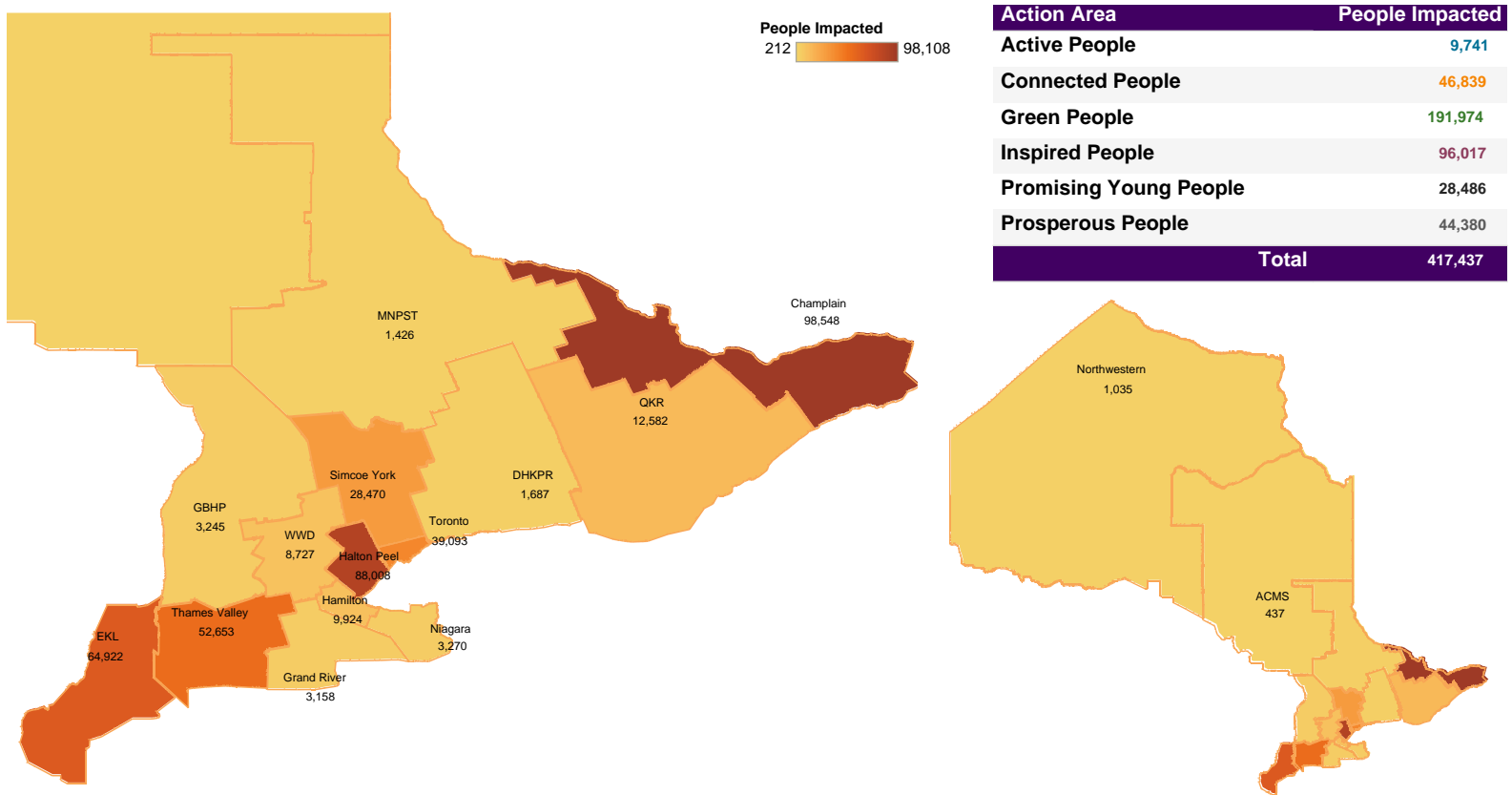
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## Schedule 2: Community Investments Overview and Analysis

### 2.1 People Impacted

The projects recommended this cycle are expected to impact the lives of over 417,000 Ontarians, 12% more than last cycle. The majority of those impacted will be reached through the Green People Action Area, which this cycle has the greatest impact per dollar invested. 96,000 Ontarians will enjoy improved access to the arts through Inspired People, the second highest impact Action Area.

Impact is heavily concentrated in certain areas of the province; over 60% of people impacted are located in the Champlain, Halton Peel and EKL catchments, while grants to the Northern catchments impact less than 0.7% of this cycle's total.



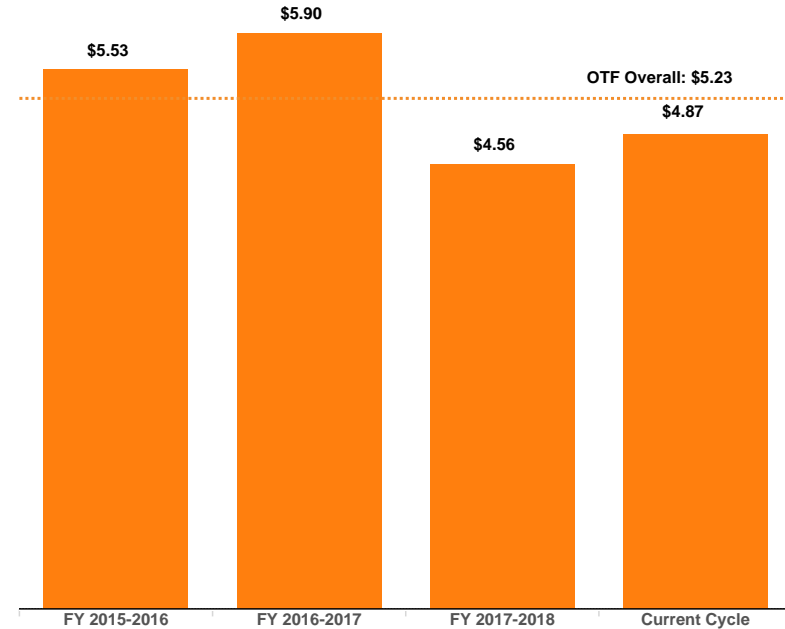
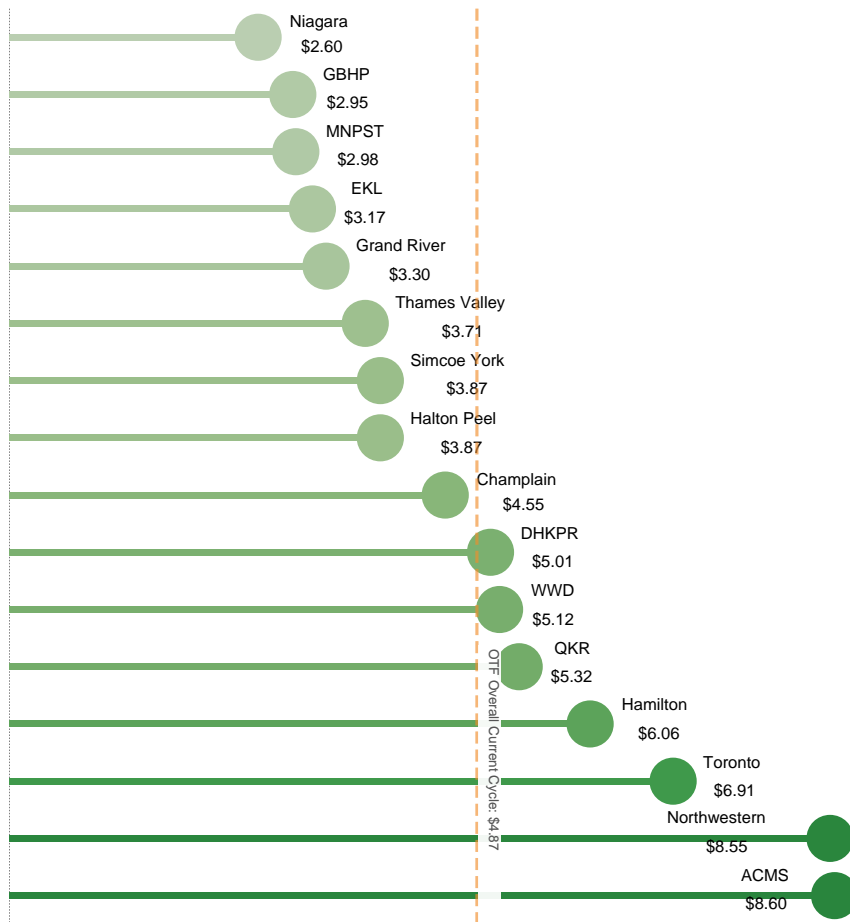
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## 2.2 Demand Overview

The overall demand for grants is slightly higher than the previous FY, with **\$4.87 requested for every dollar that has been recommended**. It is both 7% higher than last year's \$4.56, and 7% lower than the overall demand rate for OTF, which is \$5.23. Demand varies across catchments, with the northern-most catchments (Northwestern and ACMS) showing the highest demand; ACMS is the most competitive catchment this cycle, with \$8.60 requested for every dollar recommended, while Northwestern requested \$8.55 more than every dollar that has been recommended. The Southwestern part of the province, on the other hand, had lower demand for funding, with about \$3 requested for every dollar recommended.

Grow Dollars Requested vs. Dollars Recommended Current Cycle

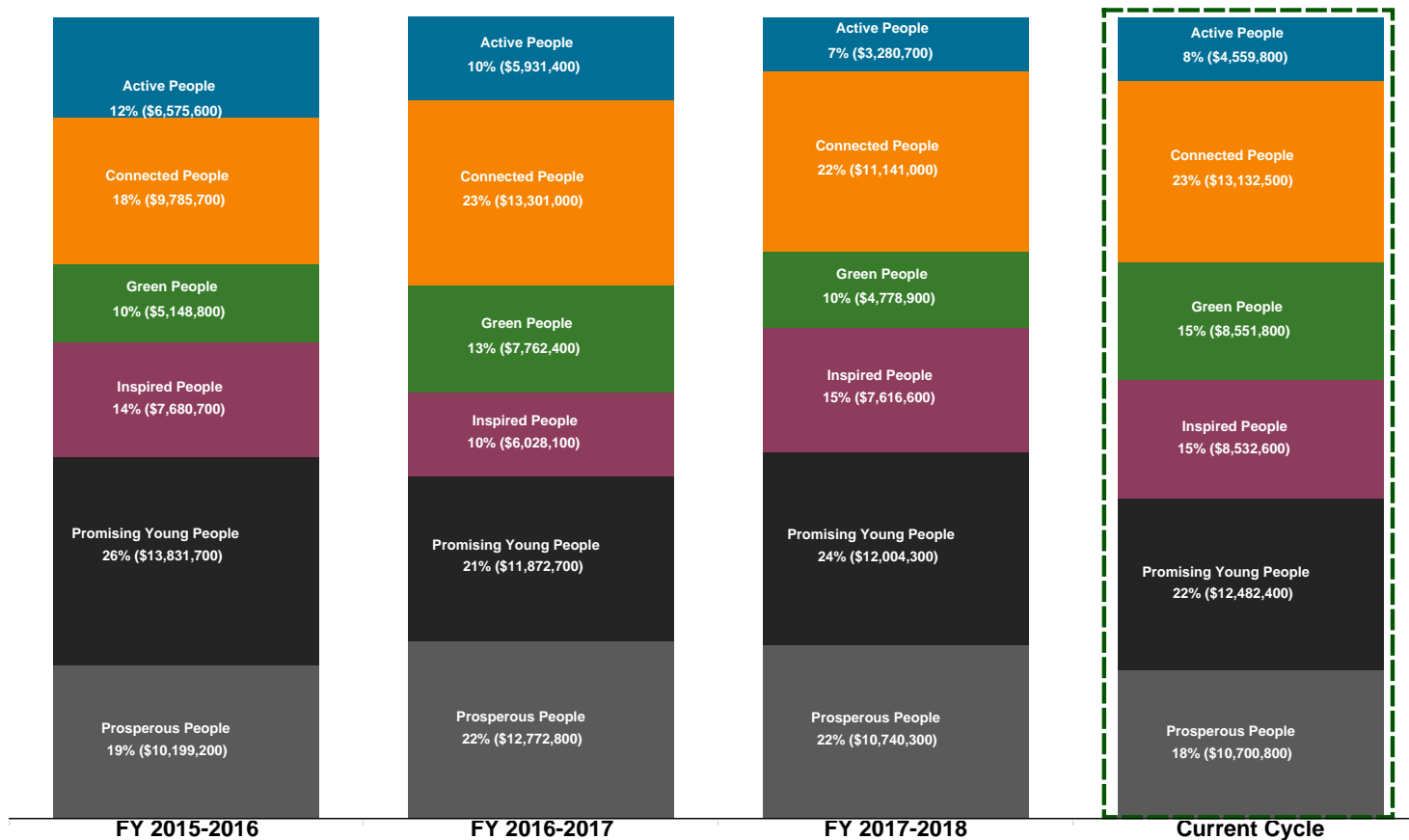


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## 2.3 Action Area Overview

Granting across the Action Areas has remained relatively consistent over the past 4 fiscal years. Compared to last year, there have been increases in the share of recommended dollars to Active People, Connected People, and Green People, which each saw an increase by 1, 2, and 5 percentage points, respectively. While Active People accounts for only 8% of the recommended portfolio of granting this cycle, that share is only one percentage point lower than the 9% requested by the Action Area. Building inclusive and engaged communities (Connected People) and supporting the positive development of children and youth (Promising Young People) continue to both request and receive the most resources of the Action Areas, at 23% and 22%, respectively.





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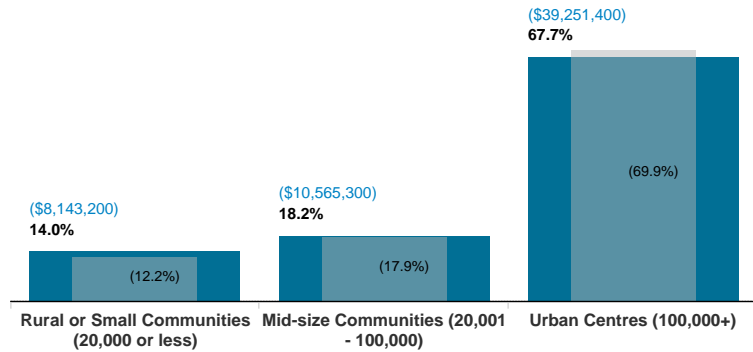
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## 2.4 Community Size, Age Group, and Populations Served Overview

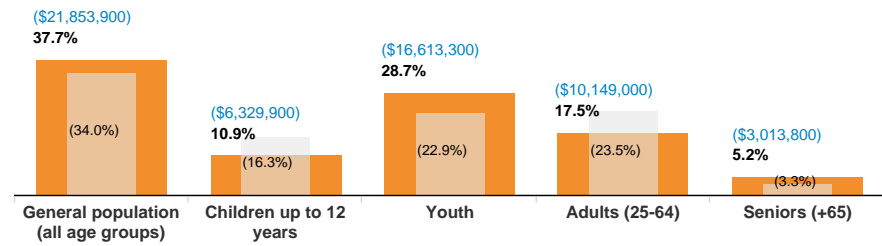
Investments benefitting members of diverse cultural communities have increased by 77% from last GROW cycle, to represent over a quarter of this cycle’s investments. Those benefitting People with Disabilities have decreased by 45%, to 11% of total investments. The share of investments by all other population groups has gone down, except for those benefitting Indigenous or Aboriginal specifically, which increased by 0.4 percentage points. For Rural/Small communities, this share, at 14%, is consistent with the trends in previous cycles, but lower than those observed in the past Capital streams where these communities usually receive about 40% of investments.

More investments are being targeted towards Youth and Seniors this cycle, with each having received an increase in the share of total proportions by about 6 and 2 percentage points, respectively.

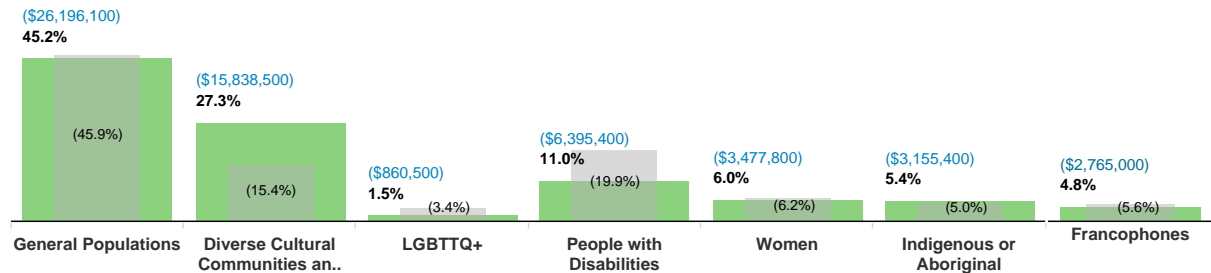
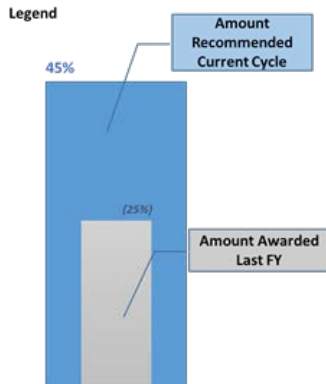
Recommended Dollars By Community Size Current Cycle



Recommended Dollars By Age Group



Recommended Dollars By Population Served



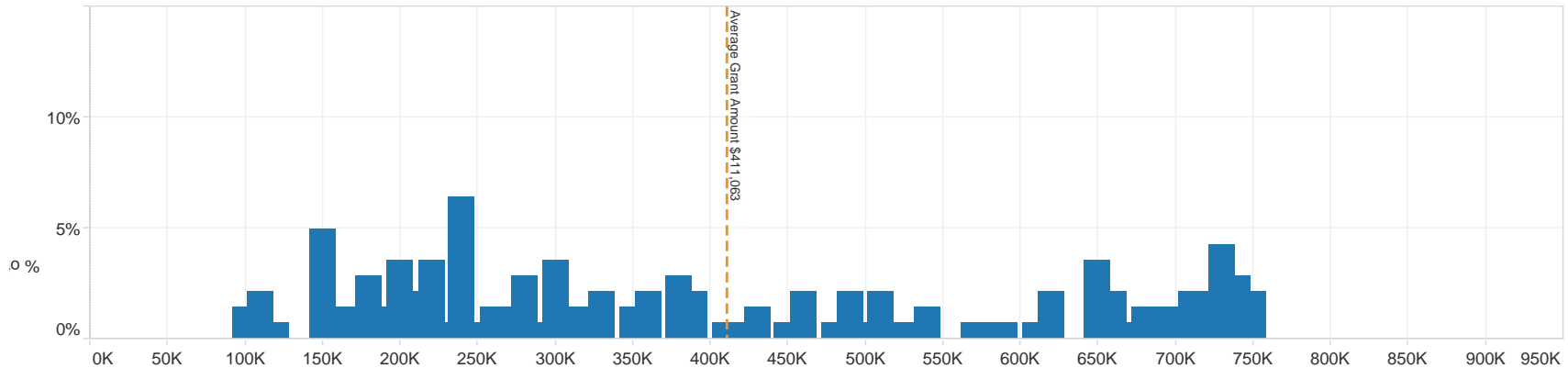
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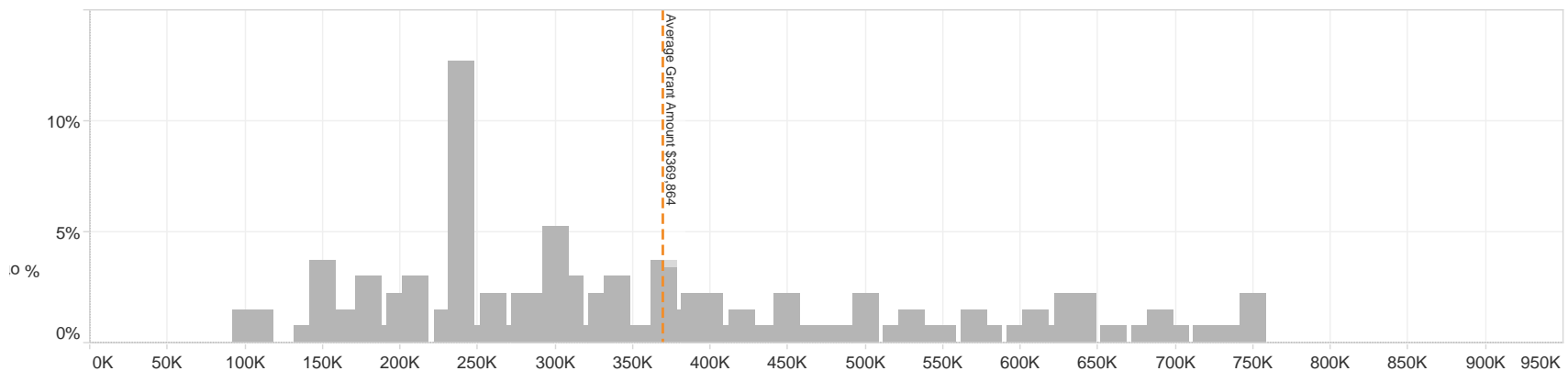
## 2.5 Grant Size Distribution

This cycle, there was a 17% increase in recommended dollars, compared to the last GROW round, with an average grant size of \$411,063 – an 11% increase from last FY. While the total amount requested for funding has increased by 25%, the total number of projects applications has only gone up by 10%. This indicates a continued trend by organizations to apply for larger grants with deeper impact, within the GROW stream. Coupled with the growing number of larger grants, there has also been a shift in the distribution of smaller grants, with relatively more requests for smaller and shorter term (less than \$200K, 2 years) funding this FY than last. These smaller requests seem to come from smaller organizations (less than \$100,000 annual revenue) and rural and small communities; the average request by small organizations was \$371,014 while the average request from Small and Rural communities was \$387,771.

Amount Recommended for Approval - Size Distribution Current Round



Amount Awarded - Size Distribution Last FY

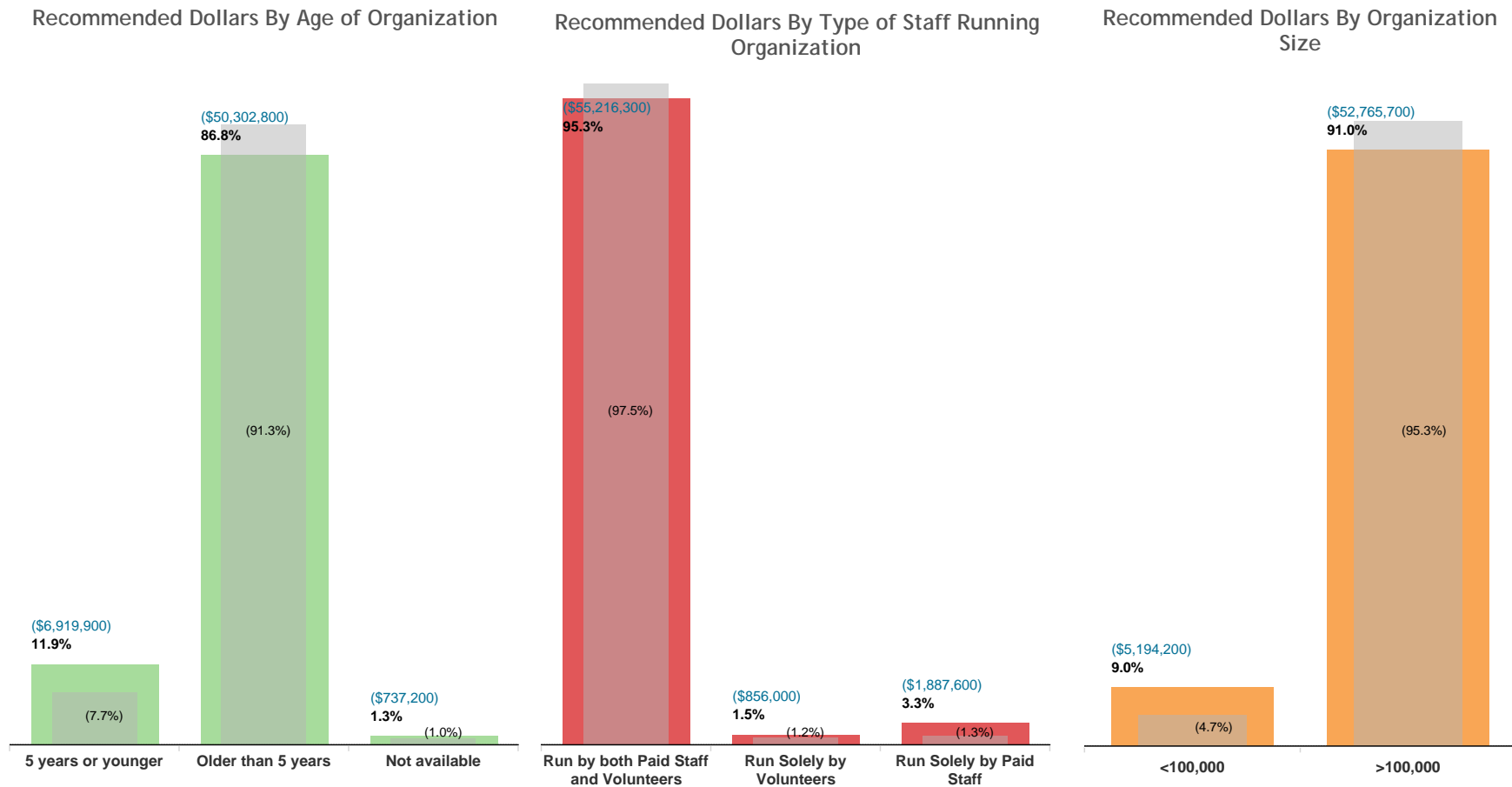


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## 2.6 Organizational info Overview

Granting towards grassroot-type organizations is increasing, compared to the last round: newer organizations have 11.9% of the recommended dollars for granting, while smaller organizations (annual revenues less than \$100,000) account for 9% of total recommended dollars. For new organizations, this is a 4.2-percentage point increase in the share of investments and close to a 4.3 percentage point increase for small organizations. Blended organizations, in terms of the type of staff, continue to receive the largest share of recommended dollars at 95.3%.



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## Concluding remarks

This report has summarized the recommended investments for this GROW cycle, which include 141 grants for \$57.9M. These investments are expected to impact the lives of over 417,000 people across the province.

A list of the recommended grants can be found in Appendix A.