

OTF Investment Summary Report
Approval of Community Investments
Prepared for the Board of Directors, June 15, 2017



2017/2018 Seed Cycle
OTF Granting Investments

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Introduction

This is a summary of the OTF GRT recommendations for grants in the Seed stream for its first granting cycle in the 2017/18 fiscal year.

In the report below, all historical comparisons are against the last 2 fiscal years of Seed granting, unless otherwise indicated. As the current cycle consists only of Community Investments, Ontario Fund investments have been removed from previous years' data, to support like-to-like comparisons.

This Investment Summary Report includes:

Schedule 1: Executive Summary

Schedule 2: Community Investments Overview and Analysis

Schedule 3: Concluding remarks

Appendix A: List of Recommended Applications for Board Approval

Appendix B: List of Declined Applications for Board Approval

Schedule 1: Executive Summary

1.1 Highlight: Technical decline rates halved, as 90% of applications meet technical eligibility criteria for OTF funding this cycle

This cycle, **90% of applications are technically eligible for funding**, compared to 78% of applications in the last 2 fiscal years. This represents a significant increase in applicants who correctly identified the Investment Stream and Grant Result aligned with their project activities and outcomes. It is also consistent with the wraparound applicant support OTF staff provided during enhanced outreach activities in advance of the application deadline.

1.2 Cycle Summary: Seed Investment Stream

We received **624 applications requesting \$36M** for investment. Of these applications, **204 are recommended for approval**, representing **\$11.4M dollars of investment** in Seed projects in communities across Ontario.

Total demand for dollars funded is lower than previous fiscal years, at **\$3.19 per dollar funded**, compared to \$4.10 on average for the Seed stream in the last 2 years. This decrease in demand is likely due to the shift to one deadline per Stream per year. In absolute terms, at \$36M in requests,

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demand this cycle is at a historical high. Demand is in fact 50% higher than the next highest cycle (Cycle 2 of 2015-2016), which saw \$24M in Seed requests. This is indicative that OTF was effective in communicating the new annual deadline to potential applicants, and that OTF continues to be an important source of funds for seeding new initiatives in the sector.

Recommended investments from GRT meetings continue to come from all Action Areas in similar proportions to the past 2 fiscal years. **Active People saw a 4-percentage point increase** in its share of recommended investments, while **Connected** and **Green People saw a 4- and 3-percentage point decrease**, respectively.

We continue to invest across Ontario, to many different community types, age groups, populations, and organization types. For example, **20%** of recommended investments will **benefit rural communities**, **24% will benefit youth**, **11%** will fund projects run by **organizations 5 years or younger**, and **8%** will be invested in projects from **volunteer run organizations**. Notably, this cycle saw an increase in funding to several equity-seeking communities: **15%** of recommended investments will **benefit Indigenous communities** as compared to 6% in the past 2 years; **4% will benefit LGBTTQ+ communities**, as compared to 1% in the past 2 years; **15% will benefit people with disabilities**, as compared to 13% in the past 2 years; and **21% will benefit diverse cultural communities**, as compared to 16% in the past 2 years.

Finally, we continue to track indicators of internal and external knowledge of the Investment Strategy.

- Technical Declines – **90%** of all applications received were **technically eligible for OTF funds**, a significant increase upon previous cycles.
- Alignment with Grant Results – **88%** of recommendations are **aligned with the selected Grant Result**, a sizeable increase from Seed cycles in previous years. Such an increase is evidence of increased internal knowledge of the Investment Strategy among staff and volunteers.
- Volunteer Scoring – We continue to see high levels of engagement from volunteers. This cycle, **98% of volunteers scored files**, and 90% of volunteers scored all files assigned to them.

1.2 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 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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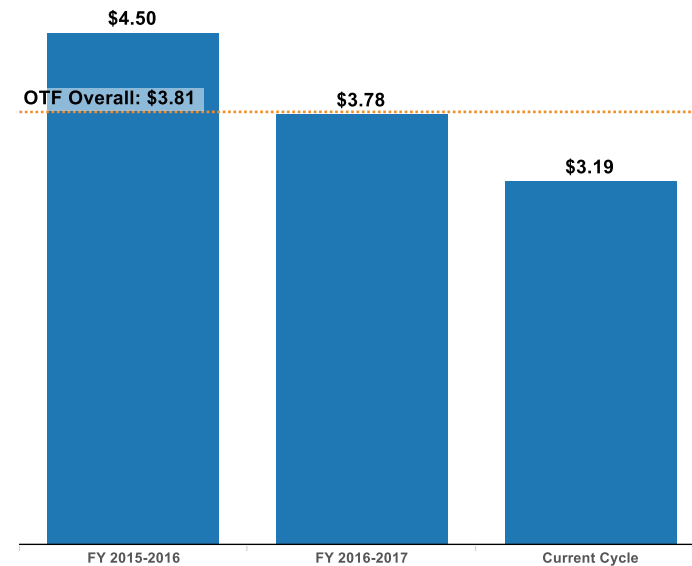
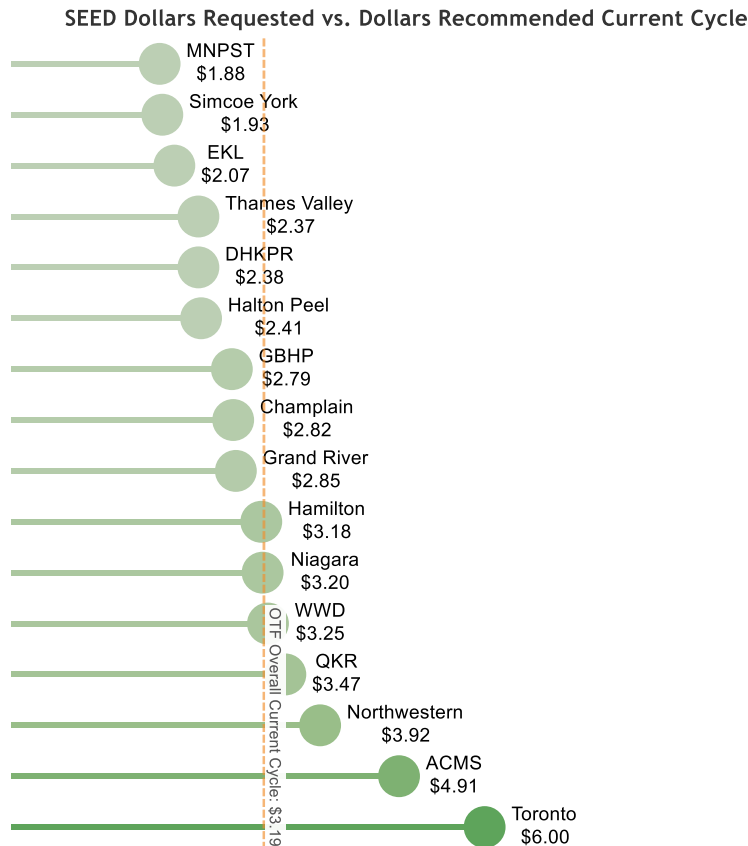
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Schedule 2: Community Investments Overview and Analysis

2.1 Demand Overview

At \$3.19 requested for every dollar funded, relative demand is 22% lower this cycle than it has been in the past 2 fiscal years. This is likely due to the shift to a single annual deadline for each Stream. In the past 2 fiscal years, 26% of applications came from organizations submitting multiple applications per cycle, or multiple cycles each year.



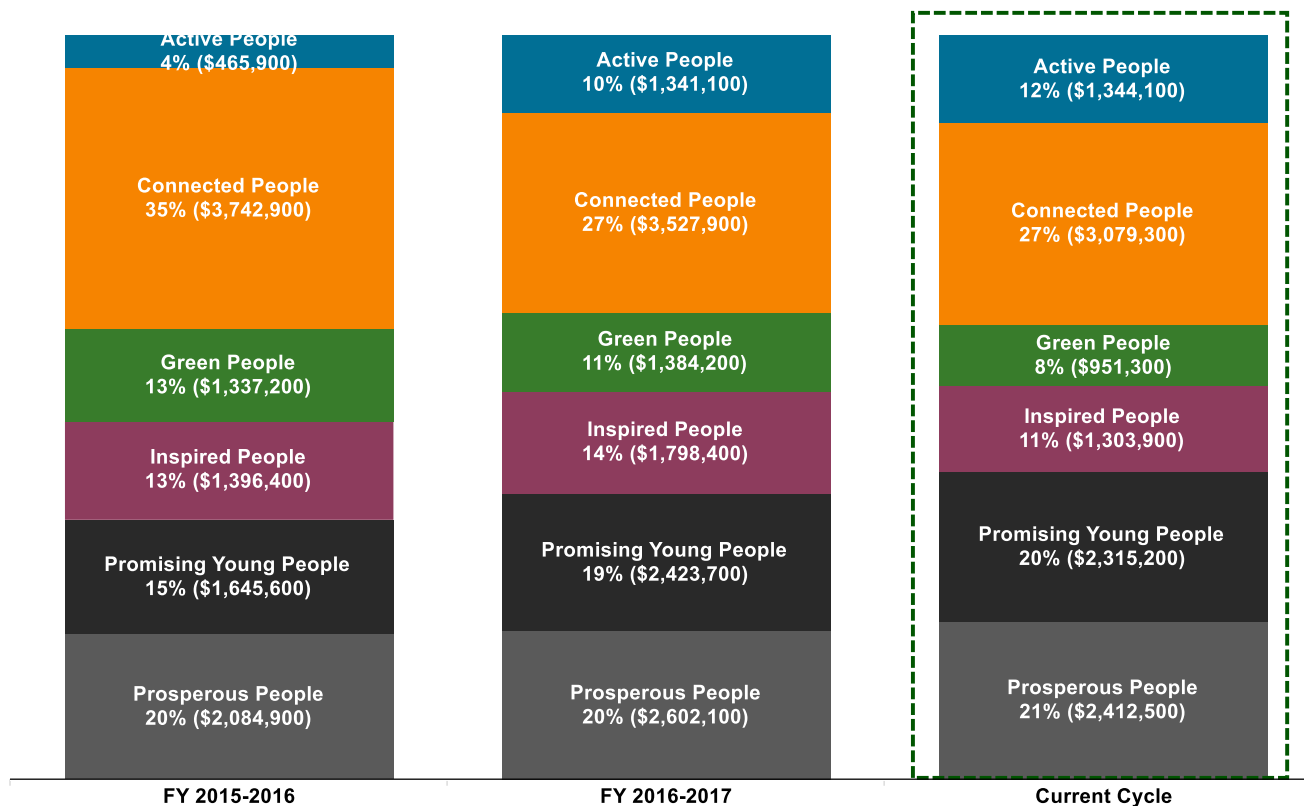
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2.2 Action Area Overview

Recommended investments across Action Areas are at similar levels as in the previous 2 years. The highest proportion of recommended funding is to Connected People, at 27% this cycle. Green People received the smallest share of recommendations, at 8% of total recommended dollars. Active People continued a 2-year trend of increased recommendations. Twelve percent of recommended investments are to Active People this cycle, up from 10% last fiscal, and 4% in 2015-2016. This increase is a result of higher quality applications. Inspired People, Promising Young People, and Prosperous People remain relatively steady in both demand and recommended investments relative to the last 2 years.



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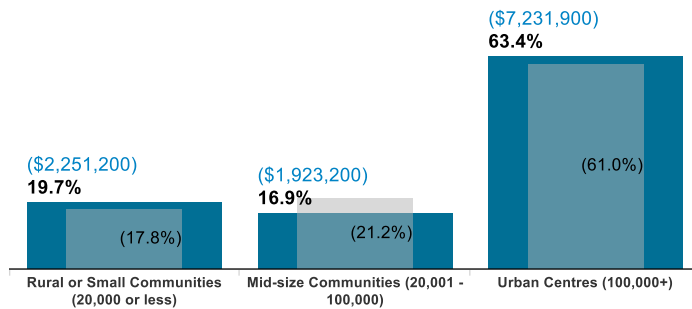
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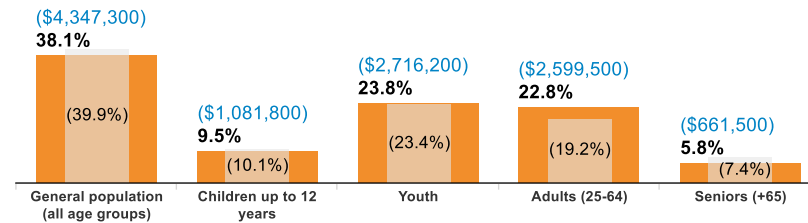
2.3 Community Size, Age Group, and Populations Served Overview

Recommended investments to Diverse Cultural Communities, LGBTTTQ+, and Indigenous communities are substantially higher this cycle. Recommendations to Indigenous communities are 15% of the total, a 130% increase from the previous 2 years. LGBTTTQ+ communities received 4% of recommended funding, a 300% increase from the previous 2 years. Diverse cultural communities are receiving 21% of the recommended funding, a 26% increase from the average of the previous 2 years. Recommended funding to Francophone communities were 4%, just over half the level of funding seen in the previous 2 years.

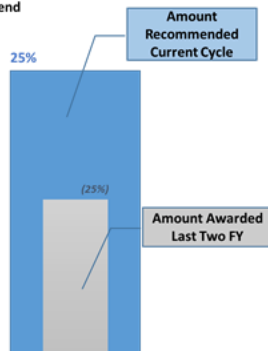
Recommended Dollars By Community Size Current Cycle



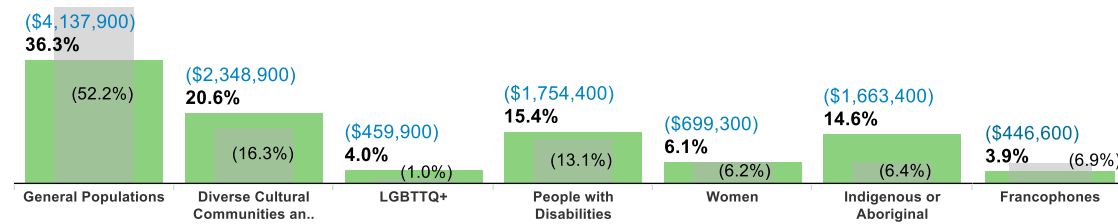
Recommended Dollars By Age Group



Legend



Recommended Dollars By Population Served



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3.0 Concluding Remarks

This OTF Investment Summary Report outlines key highlights from the first quarter of 2017-2018 fiscal year of granting, encompassing \$11.4M of recommended investments. This cycle, OTF continues to support new and innovative programs that serve diverse populations across Action Areas. We see improved understanding of the Investment Strategy from applicants, as well as increased funding to initiatives benefitting equity seeking groups across communities in Ontario.