

OTF Investment Summary
Approval of Community Investments
Prepared for the Board of Directors, March 1, 2018



2017-2018 Cycle 3 – Capital and Provincial Impact
OTF Granting Investments

OTF Investment Summary Report

2017-2018 Cycle 3 – Capital and Provincial Impact

Introduction

This is a summary of the Ontario Trillium Foundation's investments for its third granting cycle of the 2017/18 Fiscal Year. It includes recommendations made in the Capital and Provincial Impact Streams. For the Capital Stream, this is the first cycle of investments since the 2015/2016 fiscal year, as the stream was suspended for a year to deliver the Ontario 150 Community Capital program. For the Provincial Impact Stream, this is a one-time cycle focused on Grow projects that have a direct impact in a minimum of three catchments within the province (two if the catchments are in Northern Ontario).

For this report, we make comparisons for the Capital Stream, against the Capital investments from the 2015/2016 fiscal year. Given that the Provincial Impact stream is a one-time cycle, we report on the current investments only.

This Investment Summary Report includes:

Schedule 1: Executive Summary

Schedule 2: Capital Investments granting overview

Schedule 3: Provincial Impact Investments granting overview

Schedule 4: Concluding remarks

Appendix A and A1: List of Recommend Applications for Board Approval

Appendix B and B1: List of Declined Applications for Board Approval

Appendix C and C1: List of Technical Decline Applications

Schedule 1: Executive Summary

1.1 Capital Investment Stream

After a year's hiatus, the Capital Investment Stream returned with over **654 applications** for **\$62.9M** worth of funding; almost double the number received in the 2015-2016 fiscal year. This increase demonstrates the continued need for support towards capital investments for the benefit of communities across Ontario. Overall, **185 applications** for **\$16.8 M** are being recommended for approval this cycle. These recommendations will result in an additional **1.7M square feet of space** in communities across Ontario.

1.2 Provincial Impact Stream

In the first year of OTF's new investment strategy, we invested in programs with provincial impact through the Ontario Fund. Due to changes in our funding in 2016-17, OTF selected to suspend these provincial impact investments. This year, we developed a one-time Provincial Impact stream to

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invest in projects with an impact across multiple catchments. This Stream follows the same principles as the Grow Stream, with the additional requirement that they must have an impact in a minimum of three catchments within the province (two if one of the catchments was in the North). Overall, **197 applications** were received with **\$98.2 M requested**. Of these, **33 investments** are recommended for a total of **\$17.0 M** worth of funding. Overall, these recommendations are projected to impact the lives of over **173,000 Ontarians** over the next three years. Combined with Grow investments made earlier this year, OTF investments and recommendations are expected to impact the lives of over **547,000 Ontarians** over the next three years.

1.3 At a glance

We continue to track several results to understand trends in internal and external understanding and engagement with the investment strategy:

- **Technical Declines** – 75% of applications received were technically eligible for OTF funding. In Provincial Impact, 71% of applications were deemed eligible, while in Capital, 77% were technically eligible. This is comparable to the previous Capital round, where 76% of applications were technically eligible for funding.
- **Volunteer Scoring** – Volunteers continue to show a high engagement in the granting process. Overall, 96% of volunteers scored all assigned files this cycle. Volunteers were particularly engaged in the Provincial Impact Stream, where **100% of volunteers scored all assigned files**.

1.4 Action Area Noteworthy Grants

Below, we highlight noteworthy recommendations across both streams to demonstrate the expected impact of this cycle's projects.

Active People

Overall, the **\$9.6M** in recommendations are expected to increase the physical activity of **36,000 people**, and result in an extra **895,700 square feet** of space available for physical activity.

For example, the **Chippewas of Georgina Island**, who are going to construct changerooms and facilities at the Buzzy Big Canoe Memorial Arena on Georgina Island First Nation. The Arena is available for use by community members all year round, and is host to several community events, including hockey tournaments, basketball games, and summer day camps. With OTF's support, The Buzzy Big Canoe Memorial Arena is expected to increase the programming available and participation in physical activities for approximately 250 First Nation Members.

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Connected People

Overall, the investments of **\$6.5 million** in this action area will result in an increase of almost **500,000 square feet** of new space and will impact the lives of close to **15,000 individuals**. Much of this impact will be felt in the provision of accessible community spaces that will be open to everyone, leading to reduced social isolation.

The Women's Institute of Colpo Bay will see the only community hall in the area renovated for required accessibility and structural stability. These improvements will include the addition of a ground level entry wheelchair lift providing access to both levels of the building, installation of accessible washrooms, and necessary stabilization of the hall's second floor joists and beams. With these changes, this community hub on the Bruce Peninsula will become a more inclusive center for the 8400 members of the community to come together and engage with one another.

Green People

The recommended \$3.4 M investments in Green People projects will encourage **9,000 people** to support a healthy and sustainable environment.

Green Communities Canada intends to enable 2000 people to take deliberate actions to benefit the environment, by scaling up a program through which volunteers tear up and replace unused pavement with green space to absorb and filter rainwater, reducing runoff pollution to waterways. A Provincial Impact project, this will include up to 45 community partners across the province - from Thames Valley to the Northwest – who will work to divert 720kgs of pollutants from waterways. In addition, the created green spaces are expected to absorb storm water, reduce runoff pollution, reduce flood risk, conserve treated water, and mitigate the urban heat island effect.

Inspired People

Of the \$6.9 million in recommended investments in Inspired People, a majority are Capital recommendations that will increase space available for arts, culture, and heritage activities to increase by over **120,00 square feet**. Recommendations in Provincial Impact grants will enrich the lives of almost **100,000** people across Ontario through increased connection to arts, heritage and culture.

L'Association canadienne-française de l'Ontario - Stormont, Dundas et Glengarry looks to support the vitality of francophone communities in nine regions of Ontario, through the "LOL- Mort de rire!" program which will train 450 students between the ages of 14 and 18 in the art and performance of comedy in the French language.

Promising Young People

With \$4 million in recommended investments, Promising Young People recommendations will result in an additional **12,648 square feet** of space for youth, and **11,000 youth** seeing increased engagement and improved social and emotional skills.

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An example of the type of activities encouraging youth to become involved in creating solutions for challenges faced in their communities comes from **Jack.org**. Funding from OTF will provide Jack.org with expansion funding to train, mentor and provide a platform for 3,575 young people aged 15 to 24 to promote community mental health advocacy in high schools, colleges and universities across Ontario.

Prosperous People

Overall, recommended investments of \$3.6 million this cycle will enhance the economic wellbeing of **3,205 people** in the province and result in an increase of over **170,000 square feet** in available space to increase economic prosperity across Ontario.

Residents of rural Milton, North Halton, and North Oakville will be better able to meet their basic needs through the investment in a new truck by **Food for Life** that will double as delivery truck and mobile food bank. The truck is expected to improve the access to food for people in areas where lack of public transportation and/or food bank locations is a major barrier.

1.5 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 and confirms that all recommended grants are within the granting policies of the Foundation.

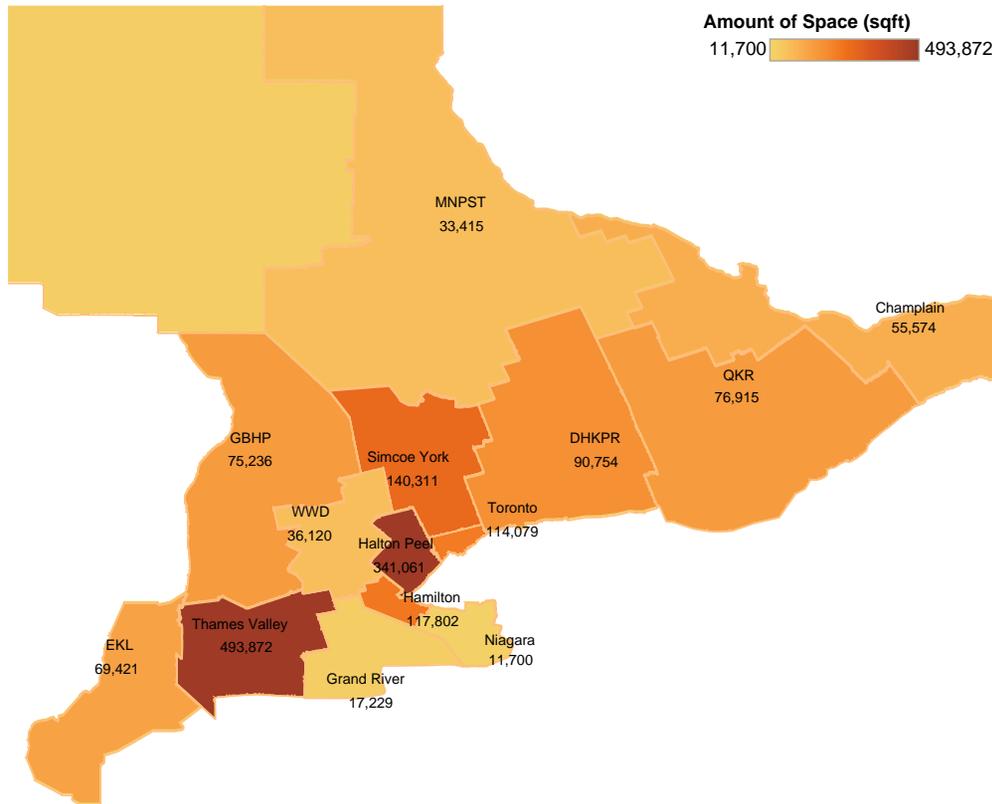
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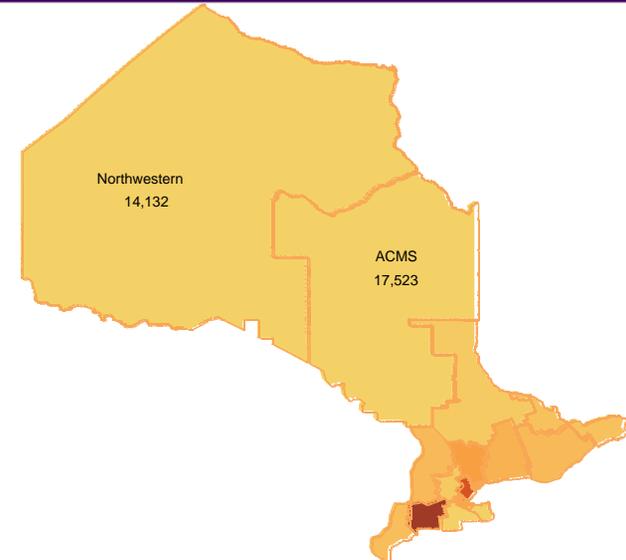
Schedule 2: Capital Investments Granting Overview

2.1 Improved Infrastructure in next 15 months through Capital grants

Capital recommendations this cycle will result in over **1.7 million square feet of infrastructural improvements to community facilities** across Ontario. This will support over **65,000 additional hours** of physical activity for community members, while those interested in the arts will benefit from an additional **6,700 hours** of performances, exhibitions, screenings and trainings in the field. Recommended investments in close to half a million square feet for the Connected People Action Area will allow people to come together within their communities, to foster more inclusive environments and reduce isolation.



Action Area	Additional hours	Space (sqft)
Active People	65,279	895,722
Connected People		502,412
Inspired People	6,706	120,447
Promising Young People		12,648
Prosperous People		170,615
Total	71,985	1,701,844



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2.2 Capital Action Area Overview

This cycle did not experience any major changes to the distribution of funding from the last Capital cycle in the 2015-2016 fiscal year. The Active People and Inspired People Action Areas continue to hold the largest shares of recommended dollars invested, with Promising Young People and Green People with substantially fewer recommendations.

While more applications were submitted to the Green People Action Area this cycle compared to last, a smaller proportion of these are ultimately recommended; only 1% of recommended investments go to Green People, down two percentage points from 2015-2016.



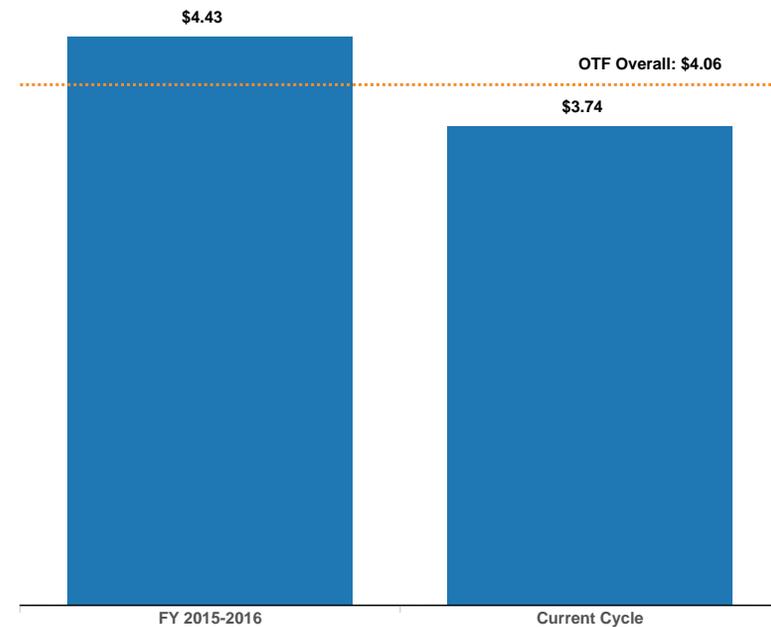
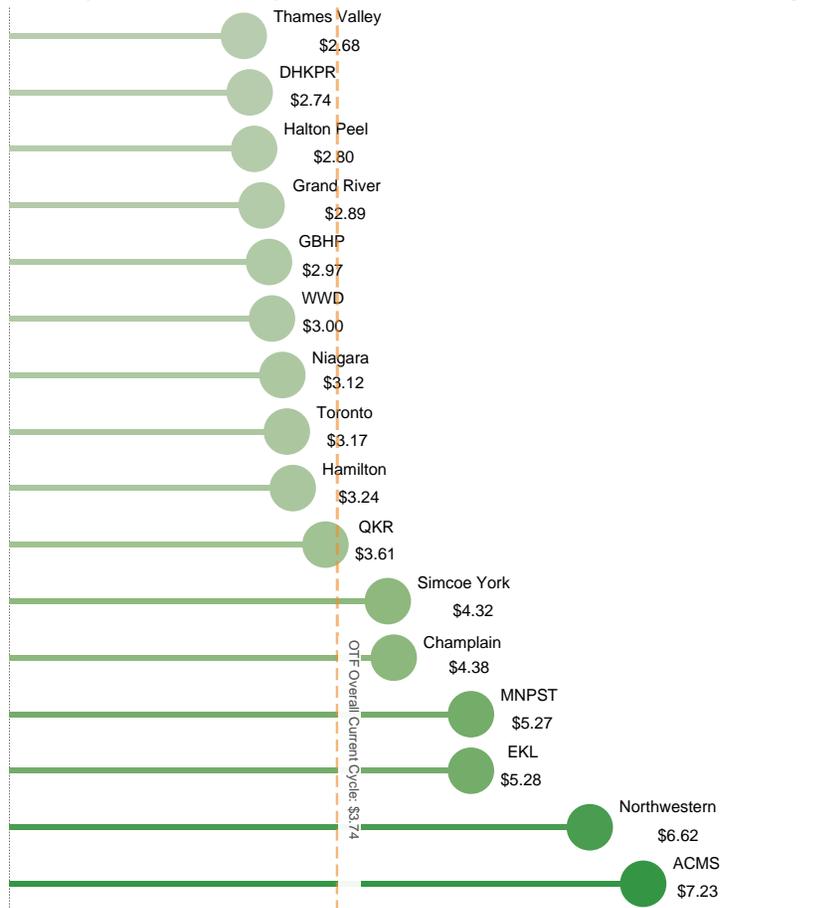
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2.3 Capital Application Demand

The demand rate measures the amount requested for every dollar recommended. For this Capital cycle, the dollars requested to dollars recommended ratio is **\$3.74**; 16% lower than in the 2015-16 fiscal year. This slight decrease in the demand ratio is likely due to a slight increase in Capital recommendations as compared to the last Capital cycle in 2015-16. Looking more specifically across catchment areas, two catchments have significantly higher demand rates: Northwestern and ACMS. These Northern catchments all have over \$6.50 in demand rates. In general, demand for Capital investments are greater in the North than in other areas across the province. For example, Ontario 150 demand for these Northern catchments was \$13.53 per dollar invested, as compared to \$6.16 overall.

Capital Dollars Requested vs. Dollars Recommended Current Cycle



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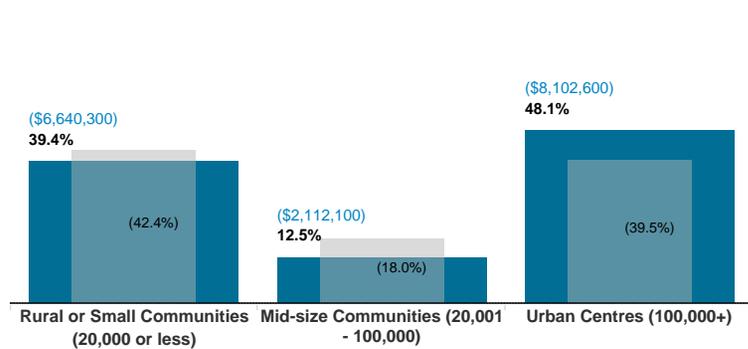
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2.4.1 Capital Investment Equity – Populations

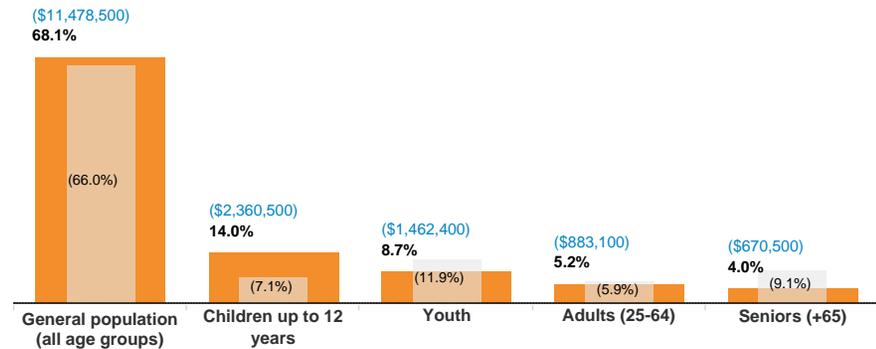
This cycle, there has been an increase in recommended investments impacting LQBTTQ+ communities **from 0% to 1.1%**, thanks to enhanced services and targeted outreach undertaken in response to OTF affinity group recommendations focused on increasing granting to LQBTTQ+ communities. Indigenous communities have also seen an increase in recommended funding of 0.4 percentage points this cycle. Capital investment recommendations towards Francophones has decreased 0.2 percentage points from previous years, going from 3.3% to 3.1% this cycle.

In terms of recommendations impacting different age groups, more projects benefitting young children (up to 12 years) have been recommended for funding as compared to 2015-16. Targeted projects that benefit youth, adults, and seniors uniquely have seen their recommended dollars decrease by 3.2, 0.7, and 5.1 percentage points, respectively.

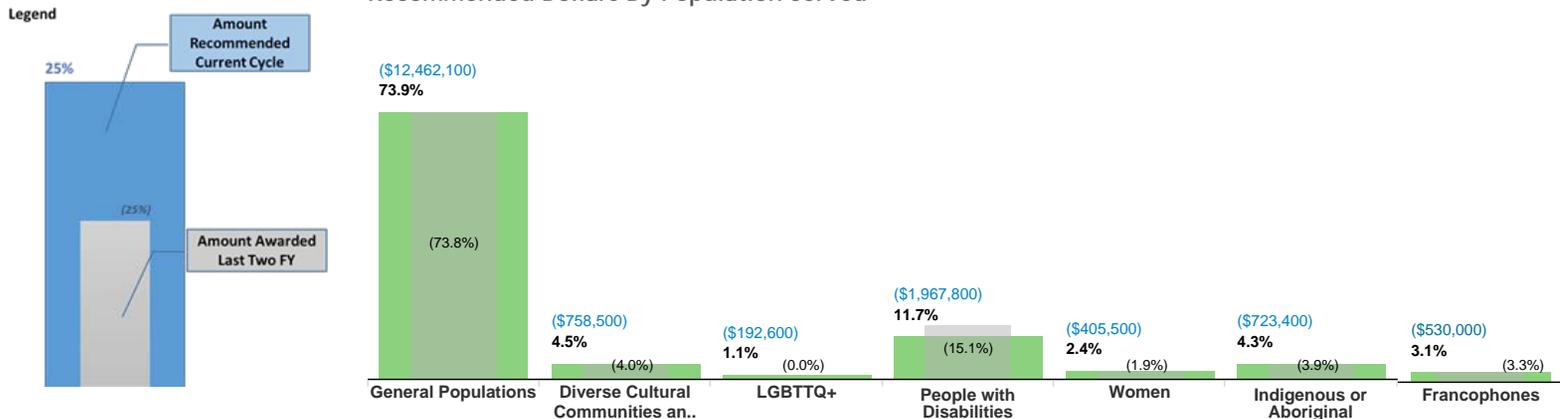
Recommended Dollars By Community Size Current Cycle



Recommended Dollars By Age Group



Recommended Dollars By Population Served



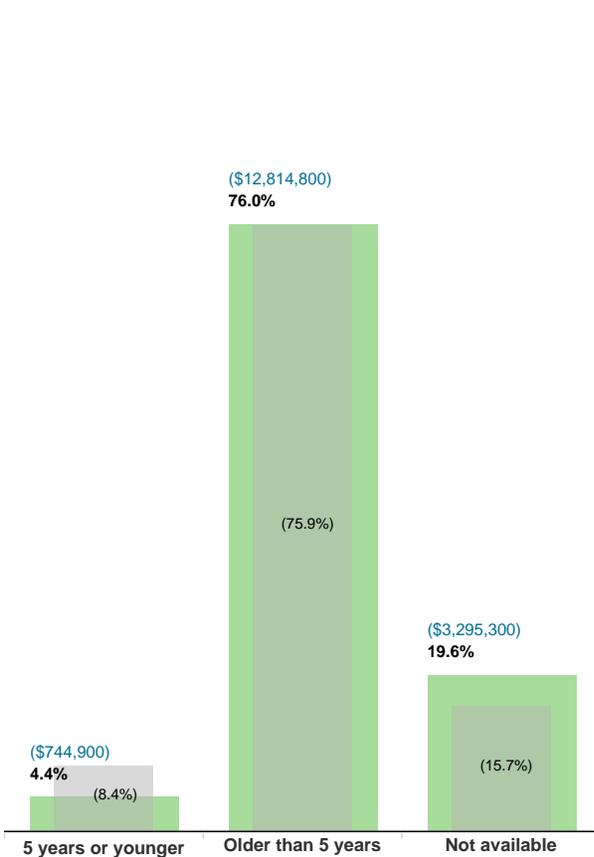
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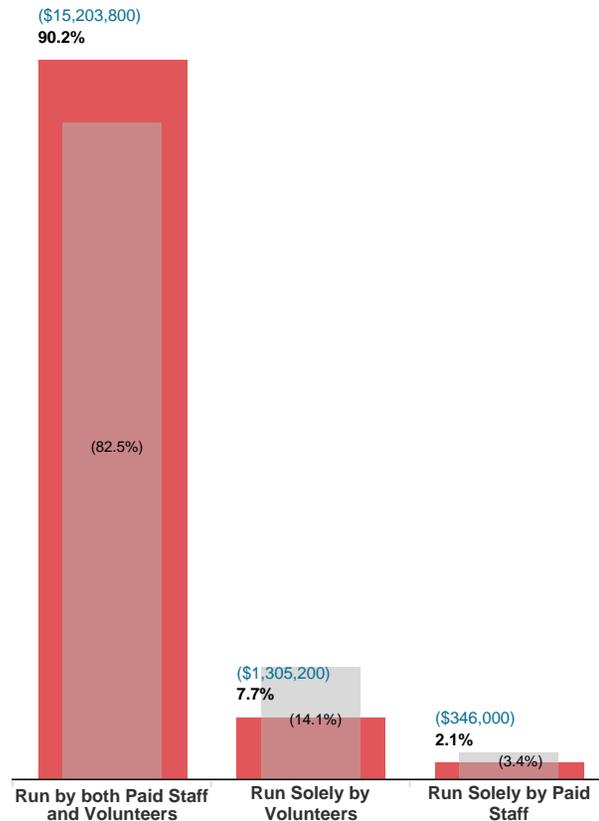
2.4.2 Capital Investment Equity – Organizations

As in previous cycles, and other Streams, larger and more established organizations are receiving a greater share of recommended funds for capital investment. Almost 70% of recommendations is going to large organizations, 76% is going to organizations older than 5 years, and over 90% is earmarked for organizations with at least 1 staff person. Recommended funding towards First Nations Communities and small municipalities (less than 20,000) is also increasing compared to last cycle, contributing to the rise in the proportion of dollars going towards those organizations with age listed as “Not available”. There has been a drop of almost 7 percentage points in recommendations to volunteer run organizations.

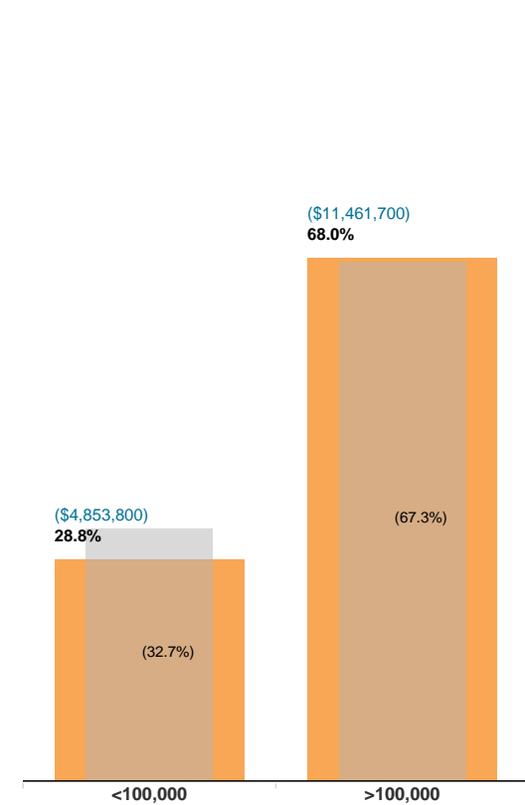
Recommended Dollars By Age of Organization



Recommended Dollars By Type of Staff Running Organization



Recommended Dollars By Organization Size



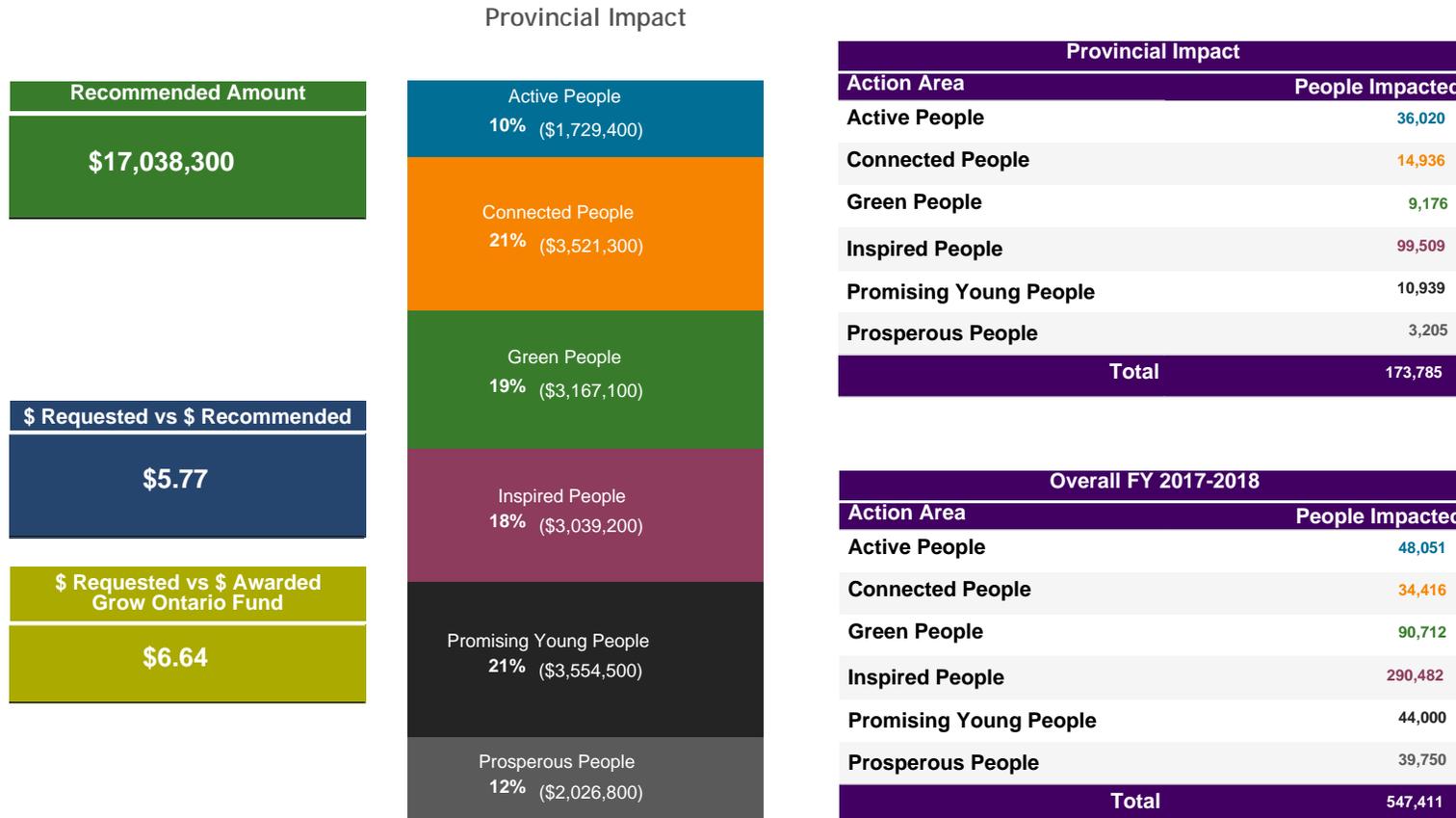
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Schedule 3: Provincial Impact Granting Overview

3.1 Projected impact through Provincial Impact grants

Over **173,000** Ontarians are expected to be positively impacted over the next three years, through initiatives recommended by OTF under the Provincial Impact Stream. Over 50% of those impacted will be reached through arts, culture, and heritage programs under the Inspired People Action Area. There are also significant recommended investments in Green People, which accounts for 19% of all recommended Provincial Impact investments. The nature of broad-scale environmental programming lends itself well to provincially-focused initiatives. The application demand for these Provincial Impact projects sits at **\$5.77**, indicating that 17% of dollars requested within this stream have been recommended for funding.



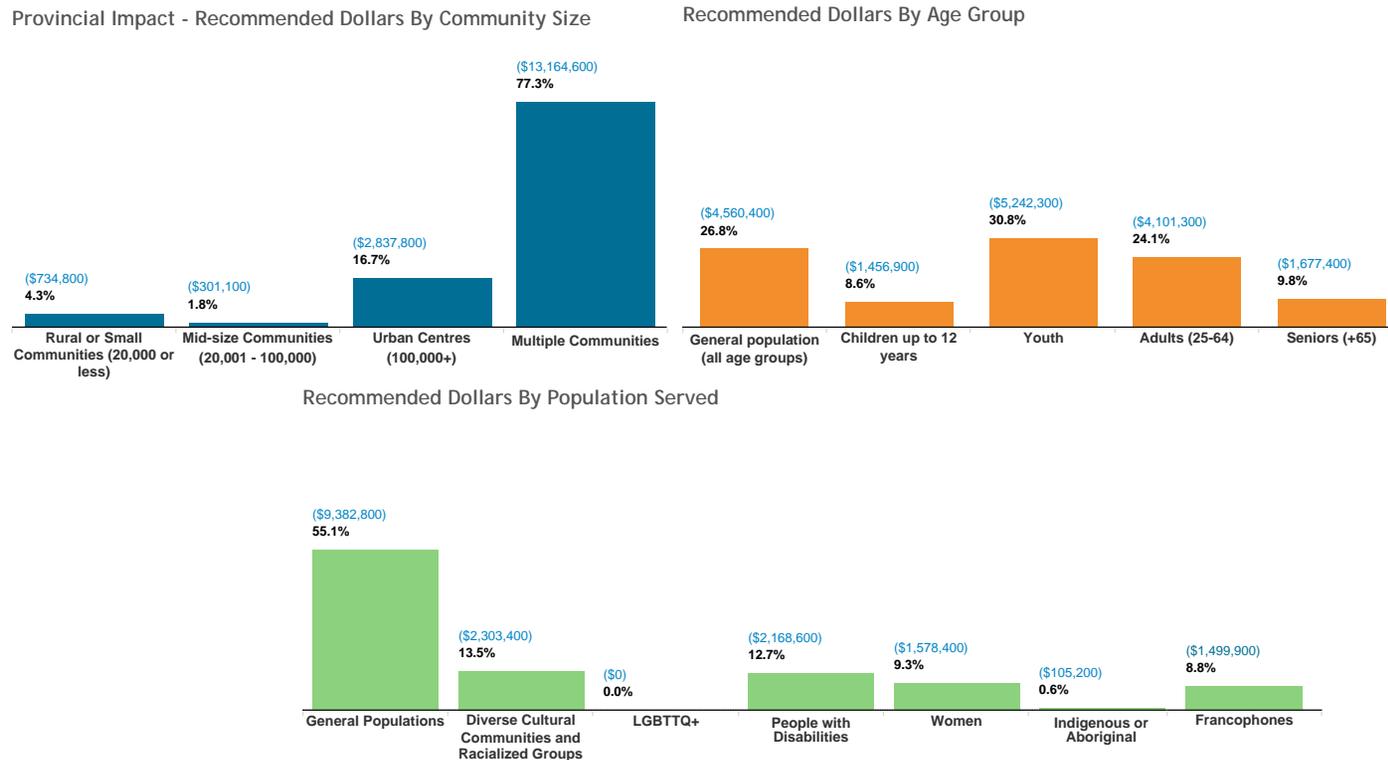
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3.2.1 Provincial Impact Investment Equity – Populations

Given the nature of the cycle, whereby each project is expected to have impact in at least 2 – 3 catchments, we observe a large majority of the recommended funding (77.3%) serving multiple community sizes. This category includes rural or small, mid-size, and urban communities, therefore the low share of recommended funding benefitting individual community sizes is not indicative of reduced recommendations for these communities. Approximately 40% of the recommendations from provincial impact programs benefit children and youth, despite only 20% going towards the Promising Young People Action Area. This demonstrates significant recommended investments that will support children and youth outcomes in other Action Areas.

There are no recommendations for projects impacting LGBTTQ+ communities, while projects impacting Indigenous communities have just 0.6% of recommended funds. However, **8.8% of recommended funding will impact Francophone communities**. This is a more than double the 3.7% of overall investments that impact the Francophone community since the launch of the new investment strategy.

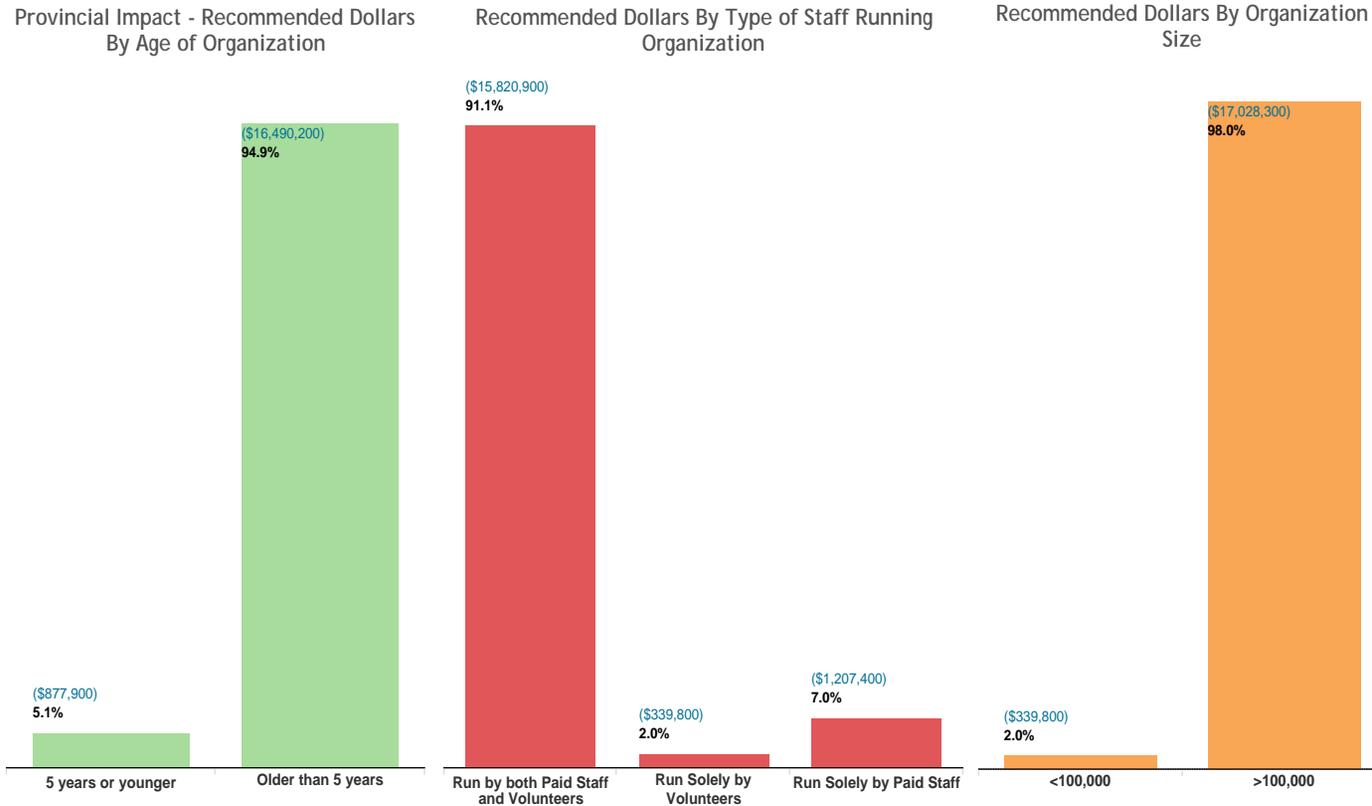


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3.2.2 Provincial Impact Investment Equity – Organizations

Larger, more established organizations are the largest recipients of recommendations this cycle, with 95% of those recommended for funding being older than 5 years, and 98% with revenues over \$100,000. That said, 5% of recommended funding is going towards younger organizations, and 2% run solely by volunteers showing the capacity of smaller organizations to take on provincial and/or multi-catchment initiatives.



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Schedule 4: Concluding remarks

This Investment Summary Report provides details of recommended investments in both the Capital and Provincial Impact streams. Through a combined **\$33.8 M in recommended investments**, the projects included in this report are expected to impact **over 173,000 Ontarians**, through programs across the Foundation's six Action Areas. Overall this year, over **547,000 Ontarians** will be impacted by OTF grants and recommendations. More than **90,000 Ontarians** will benefit from investments promoting a healthier, more sustainable environment, while **34,000** will be brought together to build more inclusive and engaged communities. Additionally, around **1.7M square feet** of renovated and new recreation facilities in the province will be made available for the increased wellbeing of people all over the province.