

**OTF Investment Summary Report
2018/2019 Seed Cycle**



Prepared for the Board of Directors, June 14, 2018
2018-2019 FY Seed Cycle
OTF Granting Investments

OTF Investment Summary Report 2018/2019 Seed Cycle

Introduction

This is a summary of the Ontario Trillium Foundation's recommendations for investments for the Seed Stream of the 2018-2019 Fiscal Year.

In this report, we make comparisons against previous Fiscal Years, dating back to 2015-2016.

This 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

Appendix C: List of Technically Declined Applications

Schedule 1: Executive Summary

1.1 Cycle Summary: Seed Investment Stream

Overall, we received **591 applications requesting \$34.6M. 182 of these applications have been recommended for approval**, for a total of **\$10.7M of investment** in Seed projects in communities across Ontario. The request for funding for this stream was 5% lower than in the 2017-2018 FY, in both quantity of applications and dollars requested. The demand rate, at \$3.23 dollars requested for every dollar recommended, is comparable to the previous fiscal year of \$3.19.

84% of all received applications were deemed technically eligible for funding, this cycle. Although this is 6 percentage points below last year's 90% for Seed, it is still well above OTF's overall technical eligibility rate of 77% of all applications received. Of those that were eligible, 56% went on to be reviewed by members of the GRT.

The distribution of funding is relatively equal across Action Areas, with Connected People, Green People, Inspired People, Promising Young People, and Prosperous People Action Areas each representing between 16-20% of total recommended investments. Active People is the only Action Area outside of this range, with 9% of the total recommended.

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Recommended investments to vulnerable groups and populations have decreased in this cycle: recommendations to projects benefiting the Indigenous community are 11.4 percentage points lower than last year, at 3.2%. Likewise, the LGBTTTQ+ communities' recommended investments are down by 1.3 percentage points, having moved from 4% to 2.7% this cycle. The Francophone community has been unaffected, experiencing an increase in recommended investments from 4.5% to 6.5% this year. There has been a shift in the size of the communities impacted by OTF funds; rural or small communities are receiving 17.4% of recommended dollars this cycle, compared to 19.7% last fiscal year. For mid-size communities, this has gone up from 16.9% to 21.2%.

New organizations are capturing 7.4% of recommended investments while those older than 5 years are sharing 89.4%; similar to last fiscal year, when 10.6% of the Seed portfolio was to newer organizations.

This cycle, **99%** of all assigned files for Volunteer scoring were completed.

1.2 Action Area Noteworthy Grants

We continue to receive strong, outstanding applications for funding. Below, we highlight some of the applications that are being recommended:

Active People

With **\$914,200 worth of recommended investment to 16 programs** across the province this cycle, OTF's Active People Seed portfolio hopes to break down the physical and financial barriers that limit the access and ability of individuals within a community to lead a healthy and active lifestyle.

One such example is through a proposed free, inclusive, after-school multi-sport program by the **Ottawa Sport Council (OSC)**. A lack of financial resources and volunteers in the lowest socio-economic status communities of the region means that there are no dedicated organized community sports, particularly for children. Through a **\$62,400 investment, OSC will deliver 120 hours of organized sports, like soccer and frisbee, to over 100 children between 10 and 11 years of age.**

Connected People

Proposals to the Connected People Action Area continue to provide good examples of programs that aim to build more inclusive and engaged communities within Ontario. This cycle, **over \$2M worth of investments** to support **34 programs** across the province are recommended.

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With **\$63,700 over 12 months**, **The Gilbert Centre will pilot an LGBTQ2S Senior Program to address the increased social isolation** of seniors in the LGBTQ2S community, and provide an opportunity for members from different generations to learn from and interact with one another. This will be the first program of its kind in Barrie, intersecting two vulnerable populations within the community, and providing them with the social support and resources to feel more connected and included in the primarily rural area.

Green People

30 programs for \$1.7M worth of funding proposed interesting and innovative ideas that help to promote a healthy and sustainable environment for Ontario communities are recommended this cycle.

Canadian Wildlife Federation has requested \$58,000 to pilot the creation of native meadows along roadsides and rights-of-way, for native pollinating insects. This initiative is expected to have an impact on the lives of 5,000 people, as well as create conservation and restoration efforts that are better planned, and more sustainable for the community.

Inspired People

Through programs in the creative industry, **36 proposals for \$2.1M have been recommended this cycle to enrich people's lives, using arts, culture, and heritage.**

A strong need for further understanding of attitudes towards Aboriginal peoples in Ontario was echoed in a survey from Environics in 2016, which showed that 36% of respondents had not read or heard about residential schools, and 60% of respondents had not heard of the Truth and Reconciliation Commission. Through a **\$64,000 investment, Soundstreams will pilot Odaabaanag ("Trains", in Ojibway) – a year-long project that leverages and encourages partnerships across community arts and contemporary music.** The pilot will engage over 40 youth, adults, and seniors to create a musical work, inspired by Steve Reich's Different Trains. By connecting the strengths of community-engaged arts and professional music, the project is expected to create a professional-community collaborative platform that will allow over 500 people in the community to share and experience stories, expressed through high-caliber art.

Promising Young People

This cycle the Grantee Review Teams are recommending **\$1.8M in investments to 33 projects in the Promising Young People portfolio.** Proposals to this Action Area offered great concepts to support the positive development of children and youth across Ontario.

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One such example is the **MIAG Centre for Diverse Women & Families**; with **\$66,400 support from OTF**, the project will pilot a **parenting workshop series with the aim of strengthening the parenting skills of Syrian refugee parents to raise children equipped with emotional resiliency, positive mental-health, self-management skills, social awareness and responsible decision-making skills**. It is expected to impact 300 members of the community, specifically those families with children between 6 and 12 years of age.

Prosperous People

Over **\$2.0M in recommended investments to 33 projects will help to enhance the economic wellbeing of individuals across the province**, including traditionally economically vulnerable populations such as women, racialized groups, and people living with disabilities.

The Alice Saddy Association requests \$75,000 for a 12-month pilot to test new ways to support individuals with developmental disabilities to obtain employment. This will be done through the promotion of a culture of employment, using highly visible employment opportunities to normalize for the broader community that employment is a possible option for many individuals with developmental disabilities. Alice Saddy Association hopes to perform a full evaluation of the program, to disseminate learnings to other agencies within the sector for broader future impact.

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 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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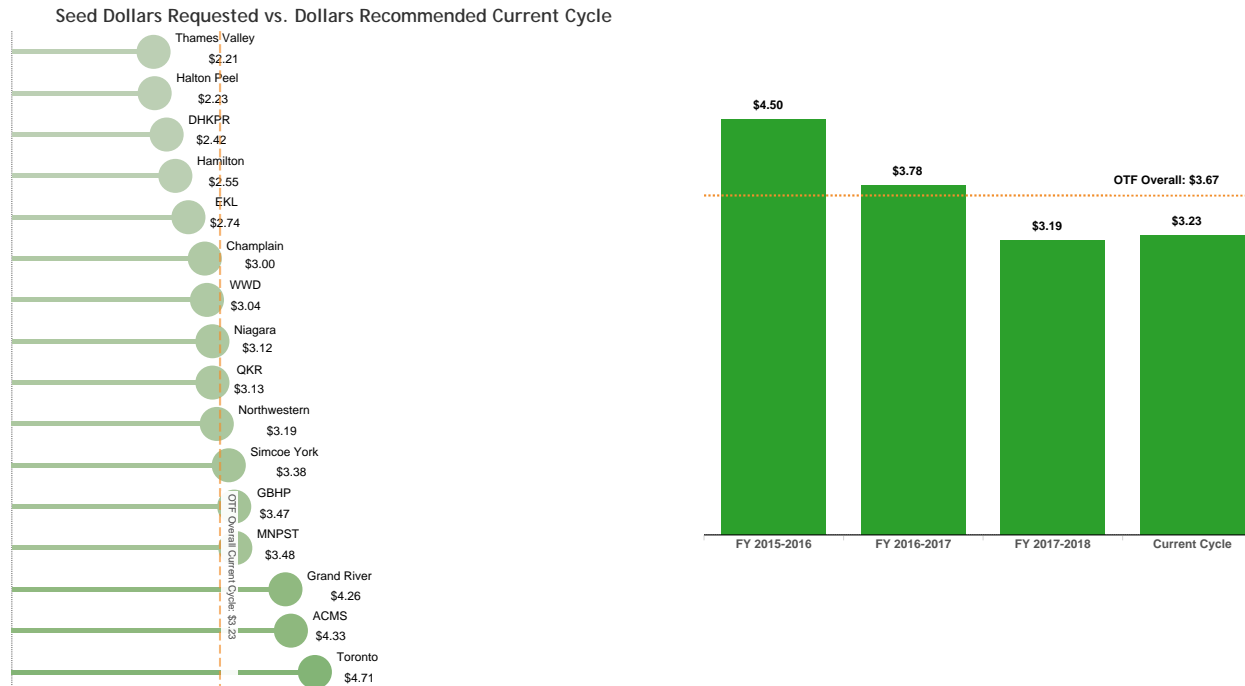
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Schedule 2: Community Investments Overview and Analysis

2.1 Demand Overview

The dollars requested to dollars recommended ratio for this cycle is **\$3.23, comparable to the previous cycle** in the 2017-2018 fiscal year and 12% lower than the OTF overall, for Seed. This is the second year in a row with lower than average demand, suggesting that the measures taken in 2016-17 to reduce demand have been successful; there was a **5% decrease in the request for funding** this fiscal year, compared to FY 2017-2018. While relative demand has increased, absolute dollars requested *and* dollars recommended have both decreased. The observed decrease in dollars recommended this cycle is due to underspending in the Seed portfolio: recommended investments equal 92% of the total available budget for this stream.

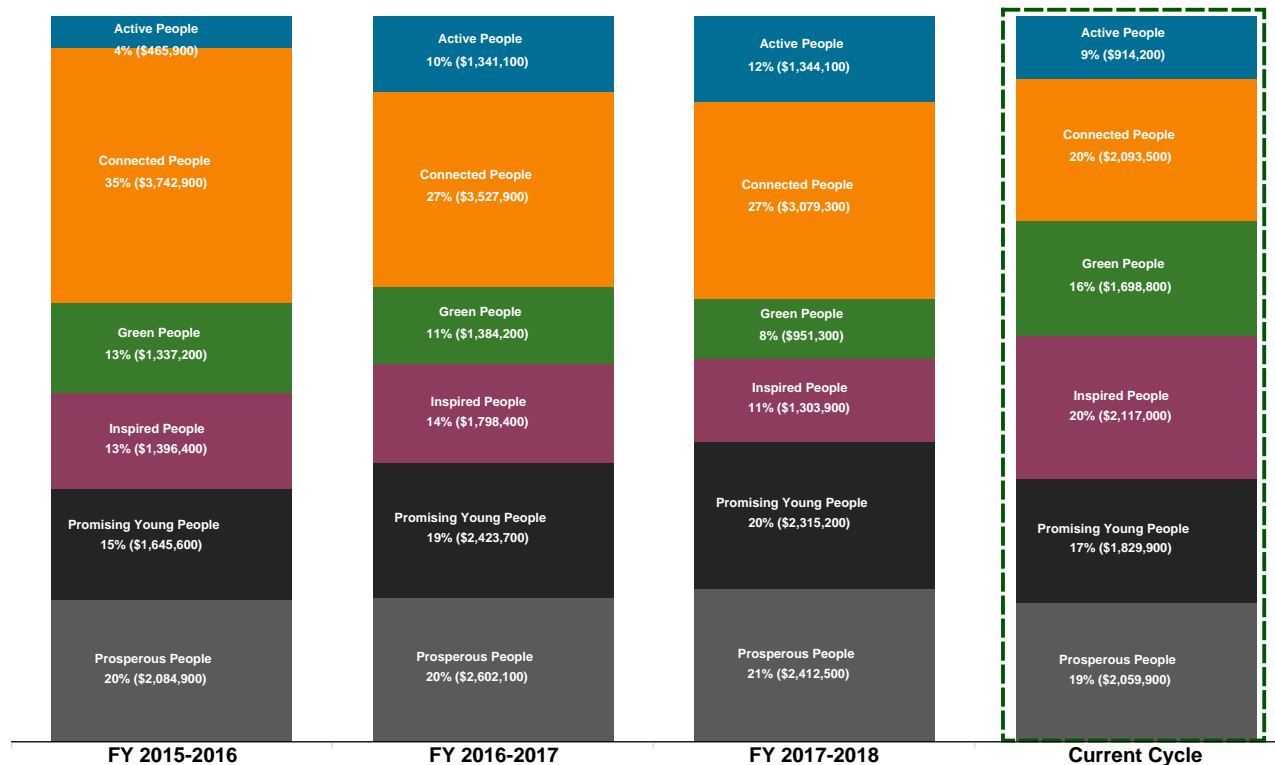
Toronto, ACMS, and Grand River, remain highly competitive with over \$4 requested for every dollar recommended. Hamilton, DHKPR, Halton Peel, and Thames Valley, on the other hand, maintain a low demand rate with a requested to recommended dollar ratio within the \$2-\$2.55 range.



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2.2 Action Area Overview

The variation of investments across our six Action Areas has been steadily decreasing over the past four FYs, with this year being marked with a more even distribution: **Connected People, Green People, Inspired People, Promising Young People, and Prosperous People Action areas all fall between 16-20% of total recommended investments, respectively.** The share of recommended dollars towards Active People has fallen 3 percentage points from the previous fiscal year; this Action Area has maintained the lowest share of investments across four fiscal years, ranging between 4-12% of total investments.

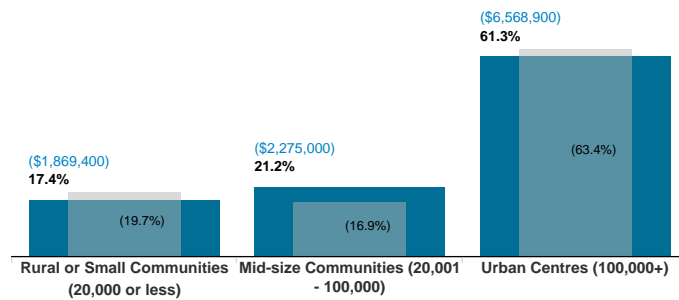


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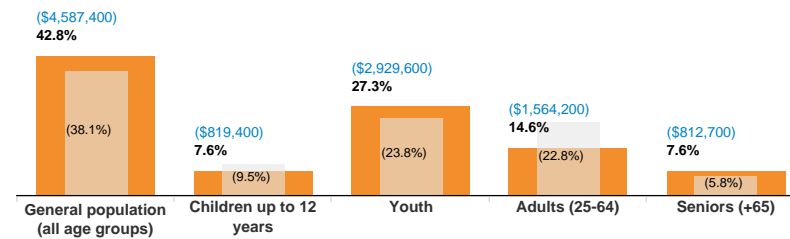
2.3 Community Size, Age Group, and Populations Served Overview

Recommended investments towards Indigenous communities were 11 percentage points lower than what was awarded the previous Seed cycle, when it was at almost 15% of total investments. This decrease does not indicate a decrease in investment equity, as recommendations benefiting Indigenous groups are proportionally greater than the Indigenous population proportion. Investments to the Francophone community have increased by 2 percentage points, to 6.5% of total. This is in-line with the proportion of Francophones in the Ontario population.

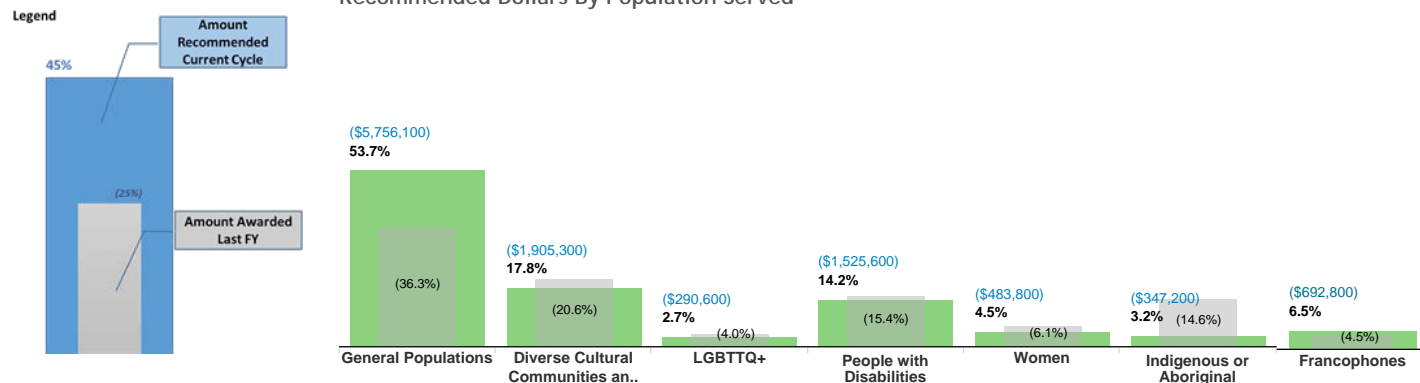
Recommended Dollars By Community Size Current Cycle



Recommended Dollars By Age Group



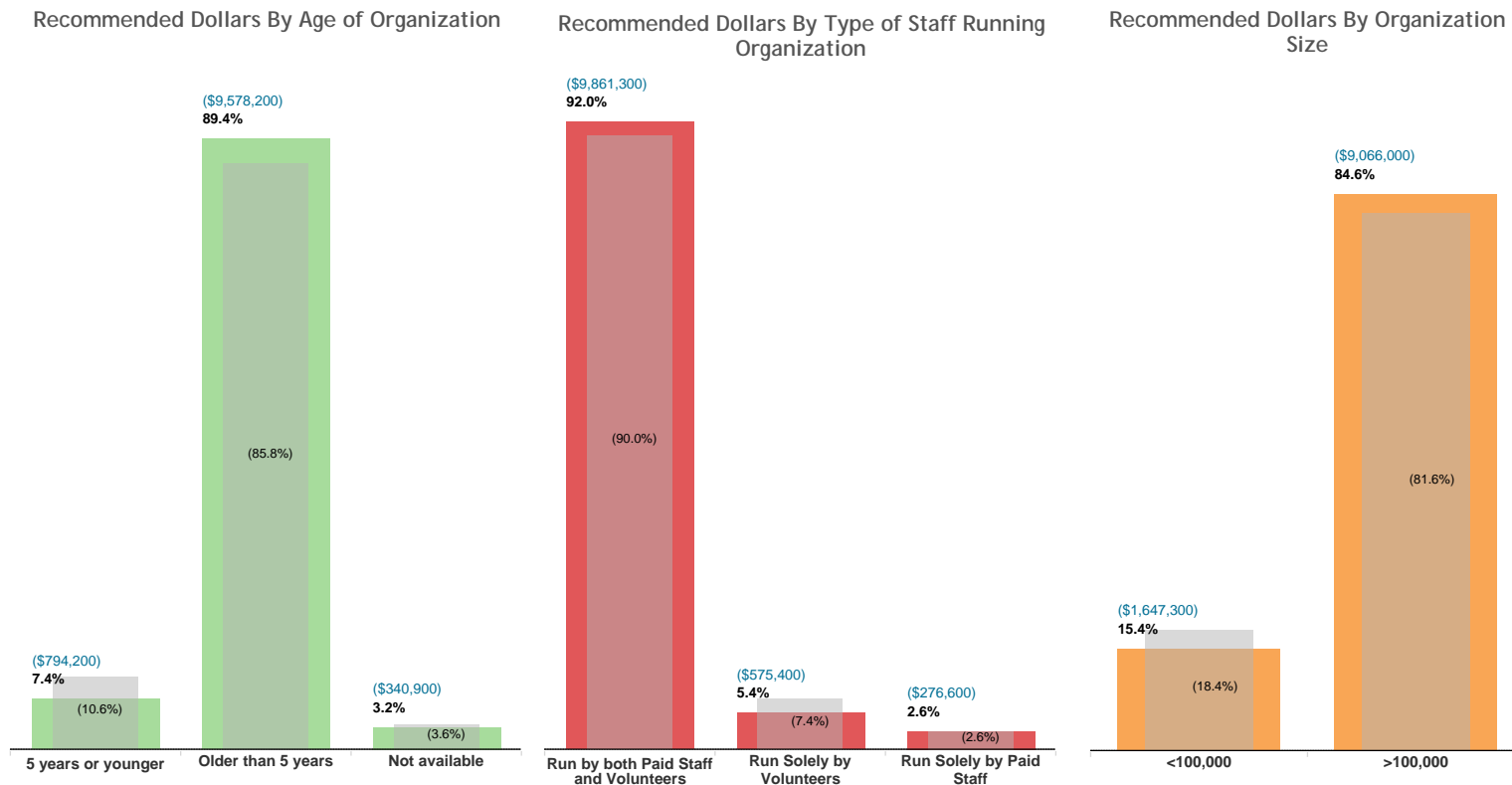
Recommended Dollars By Population Served



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2.4 Organizational info Overview

While the Seed investment stream provides funding to develop novel and different approaches to achieving results within our Action Areas (among other learning goals), it is interesting to note that **new organizations represent 7.4% of the share of investments this cycle**, which is down 3.2 percentage points from the last Fiscal Year. Likewise, those with a reported annual revenue of less than \$100,000 represent 15.4% of the share of total recommended investments, which is 3 percentage points lower than last year. There is a lower success rate for smaller organizations this year, as an increasing proportion of recommendations are going towards more established organizations, which hold 89.4% of the share of total recommendations by age, and 84.6% by annual revenue.



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Schedule 3: Concluding remarks

This Investment Summary provides the details of recommended investments for the Seed Investment Stream of the 2018-2019 FY. A total of 591 applications were received for \$34.6M of investment. 16% of these were deemed technically ineligible, largely due to misalignment with the grant result. Finally, \$10.7M and 182 of these applications have been recommended for approval by the Board.

The recommended investments are quite evenly distributed across five of the Action Areas - with Connected People, Green People, Inspired People, Promising Young People, and Prosperous People Action Areas each representing between 16-20% of total recommended investments - while Active People sits out of that range with 9% of total recommended dollars. Investments towards vulnerable groups and populations such as the LBTTQ+, Indigenous, and racialized communities have decreased this cycle, but those benefitting members of the Francophone community have gone up from 4.5% to 6.5%.