



Looking Back: Reflections on Thirty Years of Granting

Ontario
Trillium
Foundation



Fondation
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This year, the Ontario Trillium Foundation (OTF) celebrates thirty years of granting. The Foundation is using this important milestone to reflect on successes, challenges, and lessons learned over the past three decades, as well as to look forward to the next phase of its evolution.

As part of this process, a series of interviews and focus groups with key Foundation stakeholders were held, including current and former staff members, volunteers, board members, grantees, and leaders in the not-for-profit sector and at other foundations. While this process captured the perspectives of over fifty individuals, it was not intended to be a formal evaluation of the Foundation's activities. Rather, it is intended to capture compelling snapshots and related insights on the history, accomplishments, journey, and impact of the Ontario Trillium Foundation.

OTF's significant history laid the grounds for an arm's length government agency that has since grown to become Canada's leading grant-maker. Along the way, OTF has supported a breadth of community-based organizations across multiple sectors in all regions of the province. It has been able to leverage its key strengths and assets, including its financial, human, and strategic capital, to create lasting impact across the province. During that time, however, it has also had to face challenges of communicating its value and navigating its relationship with government.

This report, *Looking Back: Reflections on Thirty Years of Granting*, reflects on the past thirty years. Its companion report, *Looking Forward: Coming Trends and Opportunities for the Ontario Trillium Foundation*, provides advice on what the next decade could hold for OTF. A short video, *30 Years of Granting*, brings the key themes from both reports to life.

A SIGNIFICANT PAST

OTF has a significant history that has shaped its evolution over the past thirty years and continues to do so. OTF's founders, each a leader in the charitable or private sector, had a vision for a foundation that could play an important role in fostering a healthy and vibrant Ontario. As John Craig Eaton, founding chairman of the Foundation wrote in 1993, "the leadership of Trillium has been a co-operative effort from the beginning, involving some of the finest minds in the province, who, together, shared a vision that they could make a difference."¹

Beginning in the early 1980s, this group of people lobbied the provincial government to obtain a license to operate a daily on-line televised lottery to support charitable work. Following years of discussion with the province, the Trillium Foundation was established to provide lottery-funded grants to social service organizations.

The not-for-profit sector has changed tremendously in the last thirty years and along with it, so has OTF. At the time of its founding in 1982, OTF had a funding pool of \$15m. Today, OTF supports a diverse variety of voluntary sector organizations working on issues in four sectors, from arts and culture, to the environment, sports and recreation, and human and social services. With a current annual granting allocation of \$115m, OTF is now one of the largest funders of voluntary sector organizations in Canada. OTF has continued to be an important contributor to the development of the not-for-profit sector, while supporting a culture of volunteerism across the province through the active engagement of local communities in identifying, and selecting, opportunities for funding.

MEETING THE NEEDS OF ONTARIO

OTF's unique history has positioned it to respond to the needs of the not-for-profit sector and Ontario communities in a variety of ways. According to stakeholders, OTF has met the needs of local communities in three ways: by providing funding and support to early growth organizations, by catalyzing support from other partners, and by providing leadership and initiating innovation in the not-for-profit sector.

¹ Horsfall Farr, S. (1993). "The First Ten Years". The Trillium Foundation.



The Trillium Foundation has been a longtime supporter of Artscape. One of our first successful grant applications was for the renovation of Artscape Gibraltar Point. Since then, OTF has funded many projects that Artscape has been involved in. Not only helping us on the capital side but helping to build and share our knowledge with communities across the province and around the world.

Tim Jones, CEO, Artscape

The OTF has been an incredible supporter of CSI as we've grown over the last nine years. They were an early supporter investing in our core. Every time we've grown, OTF has been there to help support that growth.

Tonya Surman,
Executive Director,
Centre for Social
Innovation

Pathways to Education has been supported by the Foundation since before Pathways began. They were one of the first funders for our initial research work and have supported us ever since. It's been a wonderful partnership.

David Hughes, President
and CEO, Pathways to
Education

Grantees repeatedly recognized OTF as a key partner - often as "critical" to their organization's success. Through the breadth of the Foundation's giving, the substantial size of its contributions, and its thoughtful approach to funding, grantees recognized the Foundation as a "dependable and reliable partner helping to meet community needs." Rick Smith, former Executive Director of grant recipient Environmental Defense noted, "OTF is the single largest funder of environmental organizations in the province; its impact on the sector is huge."

Over the years, OTF has also increased its capacity to create and share knowledge across the sector and to draw new partners to the table. According to former Chair of the Board Janet Passmore, "over the past thirty years, OTF has evolved significantly, and distinguished their value added around process, serving as coaches and knowledge keepers in the community. They know the province." The Foundation has achieved this by building and maintaining strong relationships with individuals and organizations from all sectors throughout the province.

OTF's stakeholders recognize the important role the Foundation plays in enabling smaller or newer organizations to establish themselves and gain credibility. This desire to enhance the long term sustainability of grantees dates back to the Foundation's early days when the New Fundraising Commitment required grantees to develop alternate revenue streams to ensure that their programming could continue after the culmination of OTF's grant.

Beyond funding early growth organizations OTF has also helped to develop capacity by bringing groups together in strategic partnerships. "OTF staff recognize potential synergies and are excellent at introducing groups that could benefit from knowing each other... These partnerships, sometimes between unlikely allies, have resulted in innovative approaches to difficult problems," said the Chair of a Grant Review Team.

Stakeholders recognized that OTF funding helps to catalyze other sources of funding. Nick Saul, former Executive Director of grant recipient The Stop Community Food Centre said, "OTF opened the door for other funders to work with us... It is hard to find an early partner who is willing to jump with you. OTF is one of those partners that will and that leverages other dollars once you get going." As the first funder in, OTF was identified by at least one funder as being important to reduce the risk for others to commit their own dollars. Saul called OTF "an early investor that understood it could be a multiplier."

Other funders also value OTF's role in developing a pipeline of fundable opportunities. As Shari Austin, Executive Director of the RBC Foundation said, "Corporate funders tend to be more risk averse and prefer to fund organizations with a track record. OTF has the capacity to and is good at funding early stage organizations. They can be helpful to other funders by bringing our attention to organizations that we could fund."

OTF is recognized as a leader in developing the capacity of the not-for-profit sector. According to Saul, "capacity building may not resonate with the average donor, but it has been a crucial role that OTF has played in the sector." This approach has been demonstrated through OTF's commitment to granting for sectoral infrastructure development, grants that leverage new resources for organizations, and convening sector leaders. As one Foundation staff member said, " We see ourselves as part of the sector... We understand the not-for-profit context and we take a 'we're in this together' approach to working with applicants and grantees." OTF is known amongst the not-for-profit sector for helping applicants and grantees to build capacity through their partnership. OTF is a capacity builder.





Finally, OTF is recognized as a Foundation that seeks to spur innovation in the sector, learn and adapt, and work well with partners. Rosalind Lockyer, Executive Director of grant recipient the PARO Centre for Women’s Enterprise, is inspired by the Foundation’s approach: “OTF is keen to learn. Outcomes are stronger for everyone involved when a funder like OTF wants to learn alongside you.” From pioneering new types of granting, such as the Future Fund, to investing in early stage ideas, such as social finance or a chief economist for the charitable sector, OTF is seen as a force for sectoral innovation.

BUILDING ON STRENGTHS

OTF’s stakeholders valued the unique perspective it brings to Ontario’s granting landscape. These unique qualities include the Foundation’s large annual funding pool, intentional deployment of grants across the province, and its local decision-making process.

OTF is distinguished by the size of its funding pool, and by what many stakeholders have described as its unique relationship with government. Several stakeholders pointed to the Foundation’s continued credibility with government and the relatively stable funding that this relationship provides as a platform from which the Foundation is able to fund creative and/or higher risk initiatives. For example, several grantees noted that OTF is unique in its ability to provide capital and operating grants.

While many stakeholders noted the challenges of OTF’s rigorous application, others felt that there was tremendous value in completing the process. According to a leader in the not-for-profit sector, “when completing an OTF application, grantees are forced to think critically about their programs and whether these programs are achieving their objectives.”

Stakeholders valued OTF's community focused approach. "Because of OTF's regional offices, staff, and local granting committees, they know both the current and future needs of local communities," said Hugh O'Neil, former Vice Chair of the Foundation and MPP. OTF's timely community grants responded to local needs, and in many cases, OTF was the only source of funding for these organizations.

According to Ian Bird, former grant recipient and CEO of Community Foundations of Canada, OTF's commitment to engage local citizens "as part of the process and not just beneficiaries" is a key strength. OTF's Grant Review Teams understand and are responsive to local needs and add accountability to local communities.

In addition to its volunteers, stakeholders see the Foundation's staff as a key strength. Their compassion and commitment to their work, their knowledge base, and their highly targeted support were all cited as tremendous assets for those working with OTF. Lockyer noted, "When I talk to project officers, I can tell them the reality of what I'm working with and they are interested. That makes all of the difference to me. They made us feel that we had something really important to contribute." This intentional high engagement approach leaves applicants and grantees feeling appreciated and supported. Other grantees concurred, "OTF staff connected us to allies, research and resources. We see them as partners rather than as a funder."

OTF offers a unique balance between its locally responsive granting and its strategic province-wide focus. According to Liz Weaver, Vice President at Tamarack – a grantee and partner, "The diversity of grants that OTF makes – across regions, sectors, different types of organizations and projects – gives them an important vantage point to see how we are advancing on some of our province's greatest challenges."

TACKLING CHALLENGES

While OTF has built its success on its unique combination of assets, the Foundation has also faced challenges. These include communicating its value and its relationship with government.

OTF is known for letting grantees take the lead in communicating the value of what they are able to achieve. While its sense of humility is appreciated, stakeholders urged the Foundation to champion its successes and those of its grantees. As a component of this effort, stakeholders indicated the need for a more robust system for measuring and evaluating impact. Once this impact is better understood, OTF will be even better positioned to communicate what it does and what it has achieved to build further support.

Stakeholders recognize the unique challenges that OTF faces as an arms length agency of the provincial government. With this in mind, stakeholders emphasized the need to choose grantees carefully to maximize impact per dollar spent and to explore new sources of funding, such as private giving, that could be used to offset future funding changes.

CONCLUSION

OTF has been, and remains, a community builder in Ontario. Passmore sees “OTF as one of the founding architects of the third sector.” A nimble, progressive, and pragmatic catalyst, OTF invests in community. The Foundation marshals its tremendous human and financial resources to make a difference in the province. As it embraces the challenges of an evolving not-for-profit sector, the Foundation has created a lasting legacy across virtually all of Ontario’s communities. Moving forward, OTF must address challenges – including communicating its impact and maintaining a strong relationship with government – by leveraging its strengths and core competencies, as well as the wisdom of its stakeholders.

For more information on how the Ontario Trillium Foundation has evolved over the past thirty years, please see the companion report, *Looking Forward*, and video, *30 Years of Granting*.



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