



Looking Forward



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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 check if its new strategy is on the right track.

The Foundation is committed to ongoing improvement as an organization and meeting the evolving needs of the Not-for-profit public benefit sector. The past year has been exciting and productive for the Foundation. It has implemented a new Strategic Framework “Investing for Impact” that will guide its investments into the future, as well as offer a more in-depth way to measure its performance across all its activities in support of its Mission. The Foundation also developed a new Strategy Map to identify key directions and align our focus to bringing value to key stakeholders: the Province of Ontario, the not-for-profit and public benefit sector and its applicants and grantees.

Thirty years from now, we're going to think about the not- for-profit sector very differently than we do today. There are big questions that we need to answer about the changing role of the not-for-profit sector.

Tim Jones, CEO, Artscape

The Foundation took this opportunity to hear from grantees, volunteers and partners to confirm that it's on the right path to continue building on thirty years of success. As part of this process, a series of interviews and focus groups with key Foundation stakeholders took place, 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 future trends and opportunities that inform and support OTF's strategic direction.

As a general theme, stakeholders strongly indicated that OTF has a bright future ahead. The concept of leverage was repeatedly cited as being critical to the Foundation's future. This included the ability to use its existing resources – relationships, information, impact, and leadership – to continue to build towards even greater opportunities for healthy and vibrant communities throughout Ontario.

Stakeholders identified a variety of opportunities to build on existing resources, many of which are in line with OTF's newly developed internal strategy. OTF's relationships with volunteers, the broader not-for-profit community, partners from all sectors, the provincial government, and grantees were identified as assets that could be used to greater effect in the years ahead. OTF has always valued its relationships with its stakeholders, and consistently attempts to learn with and from them.

OTF's significant data, measurement systems, and its positioning as a thought leader are also all highlighted as assets to build on for the future. Stakeholders also felt that OTF would benefit from better communicating its story to support and enhance the Foundation's activities. The value of data and impact measurement are keenly understood at the Foundation. Over the past year, the Foundation's new Strategic Framework has outlined a new system to better measure the impact of the Foundation's work, and consequently, better tell the story of the Foundation's impact.

Stakeholders also felt that bolder leadership, an appropriate balance between responsive and proactive granting, and a measured approach to change management would serve the organization well. In concert, these efforts will help the Foundation build on its history of success.

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

LEVERAGING RELATIONSHIPS

Stakeholders repeatedly emphasized that OTF's strongest assets are its relationships with a wide range of individuals and organizations across the province. These key relationships include volunteers, the not-for-profit community, representatives from all sectors, the provincial government, and grantees. Building on these relationships, stakeholders identified several opportunities to leverage these connections to support or increase the Foundation's impact.

OTF values its relationships with its stakeholders. The goals outlined in the new Strategy Map detail how the Foundation aims to better support stakeholders and build on these relationships.¹ While

As the sector changes, we need to continue to change... especially as the lines between the not-for-profit sector and the for profit sector that invests in social impact begin to blur.

Maja Saletto Jankovic,
Director of Strategic
Investments, Ontario
Trillium Foundation


¹ The goals related to better supporting OTF's stakeholders are: Deliver high-value and accountable investments of public funds; enhance the Public Benefit Sector across Ontario in collaboration with our partners; and support applicants and grantees to maximize their impact.

developing the new Strategic Framework, the Foundation consulted with sector partners and grantees to ensure its direction resonated. OTF has also recently received the results of a survey sent to its applicants and grantees to better learn how to serve them and what trends they see in the NFP sector and challenges they are experiencing.

While OTF engages with partners in various ways, stakeholders advised OTF to connect with their community for feedback on a more regular basis. As one not-for-profit leader said, “OTF can create opportunities for stakeholders to provide honest feedback. These opportunities will enhance governance, transparency, and improve generative thinking.” OTF’s existing efforts to reach out to its community, such as the surveys mentioned above, could be enhanced by creating more opportunities for reflective local gatherings. While OTF organizes several such opportunities across the province, it has yet to do it systematically. The Foundation recognizes this fact and is implementing a strategy to more consistently organize local events that provide opportunities to exchange learning and feedback, and better promote them. Face-to-face opportunities for dialogue create value not just for OTF but for its community as well.

Grantees and other leaders in the not-for-profit sector emphasized the importance of OTF’s non-granting support in building capacity for organizations and the sector as a whole. The Foundation provides support and counseling to applicants and grantees. However, OTF has learned through the recent applicant and grantee survey that it could be doing more. Several stakeholders suggested local events where grant recipients can connect as an example of non-granting support that creates tremendous value for all involved. The Foundation is working to identify the best ways that it can provide additional support to grantees. With the development of new ways to track the Foundation’s impact, it is also exploring how it can better support grantees to track the impact of their work, and subsequently better tell their story.

Stakeholders already recognize OTF as a catalyst for many positive changes in the sector. For example, OTF has started an important conversation on opportunities for co-funding and collaboration with other funding partners. Continuing to build on existing momentum in this area, OTF will use its position to bring others from the public, private and not-for-profit sectors to the table. Partners feel that OTF should use its relationships to leverage new sources of funding from the business community and private individuals to expand funding opportunities for worthy projects and organizations. As well, it can invite new partners to participate in ways that bridge sectoral divides,



There [are] a lot more opportunities for capital than are being realized right now. Trillium has the reputation and assets to be able to take those opportunities to a new level.

Michelle Baldwin, Executive Director, Pillar Nonprofit Network

and amplify the nature of this collective impact. In fact, the Foundation is on its way to doing just that. It has hired a new staff member to exclusively help build these bridges and help other donors leverage the Foundation's expertise and relationship with the NFP sector.



Fostering a culture of volunteerism is key to the Foundation's mission. Volunteers were repeatedly cited as the core of the Foundation's work and that of their grantees. OTF can build on its role in recruiting and retaining volunteers, particularly those from the younger generation, and to nurture a community of volunteer alumni who are among the Foundation's greatest supporters.



OTF must live up to the promise that it is a key part of some of the big changes that Ontario is looking to bring about.

Ian Bird, President and CEO, Community Foundations of Canada

As the current source of funding for the Foundation, the Government of Ontario is a crucial partner in OTF's activities. It is clear that OTF values and understands the importance of its relationship with the Province. Stakeholders urged the Foundation to continue to maintain a strong relationship with this crucial partner and to play a role in strengthening the relationship between the NFP sector and the government. When exploring opportunities for innovation, the Foundation assesses and manages the government's tolerance for risk, as well as informs its government partners of new opportunities for impact or vehicles to manage the risk of new interventions, such as pilot projects or smaller experimental initiatives that could yield innovative solutions.

LEVERAGING INFORMATION

Through its grant-making activities, OTF captures an enormous amount of data on applicants, grantees, and the not-for-profit sector as a whole. As former staff member and current Manager of Community Funding at the City of Toronto, Jenn Miller said, “OTF’s ability to collect nuanced sector-wide data is a unique strength.” Stakeholders identified an opportunity for the Foundation to enhance the use of this data to support its own activities and to advocate on behalf of the not-for-profit sector. One of the ways that this can be achieved is through effective data management and data mining to provide the evidence-base to support OTF’s strategy. OTF recently joined with the Public Economics Data Analysis Laboratory at McMaster University in an open data project to explore the research value of its data. It has also entered into a coalition-building process co-funded with Community Foundations Canada to create a pan-Canadian shared measurement gathering, to build the capacity of the NFP sector.

One key component of this information strategy is the development of a robust system for measuring the Foundation’s impact. As Jim Fleck, former grantee and founder of Business for the Arts noted, “OTF must do a good job of measuring the impact they’ve had with the grants they’ve made and then try to learn from them.” This is an opportunity that OTF has recently acted on, by developing an impact measurement framework to help track the result and outcomes of its investments in communities. This new framework has great potential for enhancing OTF’s effectiveness and that of its grantees.

Stakeholders value OTF’s existing research and see an opportunity to build on these efforts to position the Foundation as a thought leader. OTF has an important role to play in the sector by continuing to develop internal research capacities to keep ahead of sector trends, ensuring that staff is up to date, positioning the Foundation to take a lead on key issues, and serving as a spokesperson for the not-for-profit sector. As Jenn Miller said, “OTF’s role as a knowledge broker and thought leader is so important to the sector. But OTF could be bolder in its leadership. There is so much learning that the Foundation has done and it is uniquely positioned to push the philanthropic sector harder on the basis of this learning.” Given existing assets, OTF is primed to take on a leadership role in this area.

LEVERAGING IMPACT

As Canada’s leading grant-maker, OTF has a significant impact in the province. Yet, OTF’s important role is not necessarily well understood by the broader public. Stakeholders see an opportunity to increase OTF’s influence by better telling the story of the Foundation’s impact. As previously mentioned, the Foundation is now collecting better data to do just that in the

There are lots of opportunities out there for us to show our leadership and take on more of a key leadership role ... To develop public awareness around granting, our subject matter expertise, and the sector. I think it is a bright future. The story is not anywhere near end of job in terms of diversifying our funding base, developing public private partnerships or co-funding models.

Dev Sainani, Chair of the Ontario Trillium Board of Directors

future. Stakeholders felt that for the Foundation to succeed in doing this, OTF should consider addressing three areas of focus:

- Enhance public understanding of what OTF is, what its activities are, and what impact it has.
- Better communicate the impact of its activities and celebrating its successes, through both qualitative and quantitative storytelling. This effort will help to raise OTF's profile and improve the quality of future applications.
- Better communicate the Foundation's impact to government. Specific and tangible examples of impact will send a strong message about the value that the Foundation is able to create.

LEVERAGING LEADERSHIP

OTF's current model balances community-based granting reactive to local needs with proactive province-wide strategy. While stakeholders acknowledge that it is important for OTF to continue to strike the difficult balance between proactive and reactive granting in a way that pushes for greater impact while meeting the needs of its diverse stakeholders, many sector partners also propose that OTF focus its funding to drive greater impact.



We operate on such a large scale across the province. This allows us a view of the sector that's unique... Having that larger view of the not for profit sector allows us to look at collective impact in a different way, to look at how provincial organizations can work with local organizations, to learn from what we've done.

Andrea Cohen Barrack, CEO
of the Ontario Trillium Foundation

Stakeholders urge OTF to take bolder leadership on selected issues where strategic granting can have the greatest impact. Ian Bird encourages the Foundation: "OTF must live up to the promise that it is a key part of some of the big changes that Ontario is looking to bring about." One signature of bold leadership identified by stakeholders is taking ownership for the results of the Foundation's activities – even when those results are less than desirable, since this will allow the sector to learn from this experience.

Given an overall high demand rate and recognizing the limited funds available to the Foundation, stakeholders suggested that OTF be even more intentional and targeted in its granting in order to realize impact. According to Liz Weaver, Vice-President at Tamarack – a grantee and partner, innovative solutions to these issues are distinguished by their “multisectoral nature and their approach to changing the ways that communities are working.” As such, prioritizing and focusing resources is crucial to amplifying the desired impact. As one not-for-profit leader expressed, “OTF can be tactical in choosing entry points for early success.” “Focus in on a few issues, take a longer time horizon and work on them more deeply,” says one private sector leader.

These innovative solutions should not be at odds with community-level needs. Rather, there is a need to look for and support community level innovation where it is occurring. According to John Cawley, Director of Programs and Operations at the J.W. McConnell Foundation, “OTF can build a unified provincial vision while allowing local residents to build on their knowledge in a way that they find empowering.” The Foundation’s new Strategic Framework aims to do just that, by outlining sector priorities, while also encouraging each local Grant Review Team to support initiatives that they feel offer the greatest potential for community impact. This funding may take the shape of local innovation pilots or grants for new organizational structures better equipped to handle 21st century challenges. The key to fostering this type of innovation is creating a shared vision while respecting local autonomy.

Finally, stakeholders urged the Foundation to continue to explore opportunities for strategic innovation – unique solutions that show potential in addressing complex or wicked problems. This approach may require periodic unevenness in granting – for example, granting concentrated in particular geographic areas or extended over longer time horizons in order to achieve strategic objectives. As Cawley indicated, “strategic innovation may require disproportionate funding; whereas a desire to be evenhanded in grant making may undermine the impact the Foundation is able to have.”

CONCLUSION

Transformational, strategically impactful, having the courage to persist in complex situations. These are the words and phrases that OTF’s stakeholders would like to use to describe OTF in the future.

As noted in *Looking Back: Reflecting on Thirty Years of Granting*, the Foundation is already demonstrating many of these traits in its current strategy and operations. Yet, as stakeholders have identified, there are specific opportunities for growth and evolution as the Foundation looks to the future. By leveraging the Foundation’s relationships, information, impact, and leadership, OTF can enhance its work building vibrant and healthy communities across Ontario.

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



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