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Success Story: Ontario Trillium Foundation

How One of Canada's Largest Grantmakers Became the First Foundation to Invest in Outcomes and Deliver On the Promise of Bias-Free Assessments

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Beth Puddicombe

Vice President of Community Investments and Project Lead
Ontario Trillium Foundation

The Ontario Trillium Foundation (OTF) is one of the world's ten largest foundations by annual grantmaking. After 30 years of helping build healthy communities as an Agency of the Government of Ontario, OTF made the courageous decision to embark on a journey of innovation that would see the transformation of their strategy, people, process, and technology. They emerged as one of the most evidence-based, digitally efficient and outcomes-effective grantmaking organizations. As a result of a significant organization-wide change effort enabled by SmartSimple's Platform3 technology, Ontarians were assured that the granting model was fair and transparent. OTF's entire granting and reporting process became completely paperless by the time the system went live and the organization transformed all of its processes to create more long-lasting funding impact in their community investments.

Ontario Trillium Foundation

Client since: 2015

Type of giving: Grants

Current platform:
SmartSimple Platform3

Previous platform:
Custom-built

Key challenges:

- Previous grants management system couldn't accommodate new strategy and vision for the organization
- Finding technology that would enable a new outcomes-based model, virtual workforce and volunteers and increase objectivity in decision-making

Key requirements

- A cloud-based grantmaking solution to efficiently manage their programs
- Capture and measure outcomes on the impact of investments
- Implement a bias-free assessment process for local volunteers and staff
- Centralized, convenient access to information by staff, board and local vendors

About the Ontario Trillium Foundation

The Ontario Trillium Foundation (OTF) is a Government of Ontario agency and one of Canada's largest grantmakers, having awarded \$115 million in grants to 645 projects in 2019 to help build healthy and vibrant Ontario communities. The Foundation's investments are driven by Priority Outcomes within six Action Areas, based on 12 of the indicators used by the Canada Index of Wellbeing (CIW) for measuring changes in the wellbeing of Canadians. Every year, over 3,000 grant applications are reviewed by hundreds of volunteers who each bring deep knowledge of local needs and a wide range of expertise to the decision-making process. OTF invests in a broad range of community projects across Canada's most-populous province, from bird sanctuaries to local skateboard parks and theatre groups. Since 2014, OTF has continued its decade-long commitment to investing \$1 billion for creating healthier communities across the province of Ontario.

Transforming to a more objective grantmaking strategy

OTF was tasked with advancing their grants management system in order to reflect the multi-faceted nature of their evolving giving efforts. Beth Puddicombe, Vice President of Community Investments had this to say of the undertaking: "How we were funding was working, but as we went through the processes, we became aware of a lot of opportunities to enhance transparency and build more effective and efficient processes. In reviewing the state of the grants management field, we knew we needed a different solution than what we had been using.

OTF was an early adopter of an online grants management system, long before the space developed into what it is today. "We decided to work with SmartSimple's cloud-based platform for our grants management technology needs and implemented the system to our new outcomes driven process with Gen3," says Blair Dimock, Vice President of Partnerships and Measurement. He continued, "We were tasked with making two critical changes in our granting: the ability to have an objective and bias-free assessment model and process; and improve the quality of the evidence that our board could be able to use for decision-making."

A more strategic approach towards measuring outcomes

In their revamped approach to investing in communities, OTF focused on not only which nonprofits they funded, but how they funded them and what they funded them for. As such, they were able to better define community problems and measure solutions. In OTF's new investment model, funding is assessed through six Action Areas, based on 12 of



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Blair Dimock

Vice President of Partnerships and Measurement
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the indicators used by the CIW. These Action Areas are addressed by supporting different kinds of projects being undertaken by the right nonprofits who are experts in the field in which the projects are identified and funded. However, OTF's internal processes did not yet support this new model and needed to evolve in order to stay in line with these new practices. This was especially important so that the Foundation could more effectively measure their funding outcomes. Blair defined OTF's mission by saying, *"We needed to have more action and less talk to enable the provincial government to see the real impacts our grants were having."*

Executing on a new strategy through technology

To effectively track and measure all of their giving efforts while still building a final strategy, OTF needed technology that could enable them to continuously adapt to a then still evolving strategy. This required different layers of planning. *"We needed to needle down on the variance of change data collection pieces, starting from a high level and going down and down,"* says Beth. *"Working closely with Gen3, they configured SmartSimple's platform to start with the data collection source of research and narrowed it down to six Action Areas that addressed community health. Within each action area, they strategized priority granting outcomes."*

This was a very ambitious strategic undertaking, and by using their system powered by Platform3, OTF developed and adopted a set of standardized survey tools, including *"a standard menu of actions and measurement models to address each of these action areas,"* says Blair. *"We designed our grantmaking system and strategy to be as simple and easy to work with as possible without administrative burden, standards we continue to measure our performance against as a funder"*

A successful launch

Change is hard, no matter how much better a new model might be. It can often still take time for all stakeholders to understand it and adapt to it. *"We were able to get everyone on board much quicker by telling people why we were changing our model and we were easily able to do that with our comprehensive system,"* says Beth. This was a chance for all OTF's staff to move focus away from who was processing the grants to what the actual outcomes were. *"Our process design was focused on the embedded data model that allows us to capture and support our reporting activities and other work processes to become more data-driven and evidence-informed,"* says Blair. By having a clear strategy and design



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for a solution for supporting it in place, user adoption and change management was much more streamlined, and their stakeholders could better understand the new model’s mission and application.

A future-proof platform to weather unknowns

COVID-19 threw a wrench in everything, and the world now operates much more differently than any industry could have anticipated. However, with a cloud-based system set up to be accessible and managed remotely, OTF was able to respond to the unprecedented situation without disruption. *“Since everything on Platform3 is in the cloud, no one missed a beat. We have staff across the province, so our system was built knowing assessors would not be located in the same place. During COVID-19, it has allowed us to easily offer flexibility to staff and grantees.”* says Beth. *“Our work with Gen3 and SmartSimple, along with having everything in the cloud, has been a huge asset,”* continues Blair.

Ready for whatever comes next

With a strong strategy in place, and a clear method of data collection and outcomes measurement, OTF is able to now fund organizations even more effectively. They have made their vision of a more streamlined and objective grantmaking process and their mission of better tracking funding outcomes come to fruition, despite a year full of unprecedented challenges. Now with their eyes to the future, they’re looking to make their system even better. *“We’re always trying to find efficiencies and, [with] digitization in mind, that includes working on our website where all interested parties can find information about OTF funding and start an application on it,”* says Beth. *“Now with the ability to pivot and make changes as we need to, we’re better equipped today to handle a situation like COVID-19 and adapt to any changes that come our way,”* says Blair.



Since 2007, Gen3 has been developing, configuring, and implementing holistic grant and case management solutions enabling philanthropic organizations to align their vision with the achievement of their goals. By leveraging the dynamic flexibility of SmartSimple's Platform3, Gen3 delivers state-of-the-art collaborative solutions that empower some of the largest, highest profile organizations in the world, enabling them to maximize their mission's impact.

Gen3 takes a truly collaborative approach that enables them to understand unique business challenges and deliver software solutions that truly transforms organizations. They work with clients to identify their requirements, recommend and implement flexible and innovative solutions, train their personnel, and ensure a successful go-live.

Learn more at www.gen3impact.com