

Research Brief – 101

Ontario Trillium Foundation Applicant Survey

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Ontario Trillium Foundation Applicant Survey

Background

In 2005, the Ontario Trillium Foundation (OTF) engaged IPSOS to conduct a comprehensive survey of its grant applicants. The Foundation wanted to learn more about applicants' satisfaction level, their views on OTF customer service quality and program effectiveness, their reaction to potential program changes and many other matters. The goal was to use this research to improve its services.

In late 2005, IPSOS interviewed a total of 606 grant applicants – 300 successful applicants and 306 unsuccessful applicants. Participants were selected to allow for analysis based on a number of criteria including outcome, region, sector, grant type, language and First Nations.

In March 2006, IPSOS conducted three Follow-Up Focus Groups (two in Toronto, one in Ottawa) to explore issues raised in the initial study. In addition, IPSOS conducted 22 follow-up interviews with Francophone applicants from the initial study.

What We Learned

Most OTF applicants held a positive impression of the Foundation. Eighty nine per cent held a favourable view, including 69 per cent who held an extremely or very favourable view.

OTF applicants acknowledged the Foundation's positive impact. They recognized its effect on communities, the province and in each of OTF's four sectors. Ninety four per cent shared a nearly universal belief that the Foundation has a positive impact on Ontario generally and their community specifically.

OTF applicants thought that the Foundation was relevant to their sector, community and organization. OTF applicants gave the Foundation high marks for communicating its vision and goals. They also rated the Foundation highly for understanding their sector, community and organization.

Overall satisfaction with the Foundation was high. Fifty six per cent of all applicants said they were very or extremely satisfied with OTF. Another 25 per cent were somewhat satisfied. There were significant differences in levels of satisfaction between successful and unsuccessful applicants. Only 30 per cent of unsuccessful applicants were very or extremely satisfied, while 82 per cent of successful applicants were very or extremely satisfied.

Applicants appreciated the Foundation's counseling and support during the application process. Eight in ten of all applicants (including two thirds of unsuccessful applicants) agreed that participating in the application process strengthened their organization.

Service delivery achieved strong scores. Applicants gave the highest ratings to OTF for courteousness and professionalism. They also scored OTF high on a number of other quality service indicators. These included how OTF responded to information requests, the quality and consistency of information provided, the provision of French Language Services and the ability to understand the organization's situation.

Deadlines worked for applicants. Of the survey participants who applied after the introduction of deadlines in 2004, seven in ten felt the deadline had a positive impact on their ability to submit the application.

Almost all applicants used and acclaimed the OTF website. Nine in ten applicants had accessed the Foundation website. They gave positive ratings to its look and usefulness, including how easy it was to find and understand the materials.

There was broad support for an online application process. The vast majority of applicants used the OTF electronic version of the application form. Eighty five per cent said they would likely use an online application process if one is available in the future, including 61 per cent who responded, "very likely."

Capital applicants were more positive toward OTF than applicants for project or operating grants. They had better impressions of the Foundation and were more satisfied overall with the application process than other applicants. They also found the application process easier.

Opportunities For OTF

Address the needs of those who were unsuccessful in their application for funding.

Successful applicants were generally more positively inclined toward OTF, across most measures, than unsuccessful applicants. Successful applicants were also more likely to have a better impression of the Foundation after the application experience and agreed that the process strengthened their organization. The vast majority of unsuccessful applicants claimed that they had to adjust part or all of their planned activities and programs because their grant was declined.

In addition, to many, a declined application felt like a personal rejection of their organization. Applicants wanted more sensitivity in how OTF told them that their application had been declined. One option would be to advise applicants about the great demand for OTF funds. Declined applicants responded more positively when they learned that the Foundation can only fund half of the requests it receives.

Address difficulties in completing the application. Most applicants found the process challenging. Successful applicants who had been able to run ideas past an OTF person knowledgeable about the process felt this personal contact was key to their success. Unsuccessful applicants thought a lack of personal interaction was key to their failure.

Provide more feedback on how OTF makes decisions. Nearly half the unsuccessful applicants felt the Foundation did a poor or very poor job of explaining why their application was declined. They would like more feedback on reasons for the decline. They would also like more information on what they could do differently to achieve success. Such feedback would help all applicants better decide whether and how they should invest their time and resources to complete an application.

Narrow the perception gap between Francophone and non-Francophone applicants.

Francophone applicants provided high ratings for the Foundation's French Language Services. But other measures of their views toward OTF were less favourable. For instance, they were less likely to feel that OTF had an impact on their community. They were more likely to feel the Foundation was very poor at understanding their organization's programs and goals. They were significantly more likely to feel that OTF was poor at understanding the community in which they operate.

In the Follow-Up Survey, Francophone applicants agreed that there is a need for more:

- Personal interaction;
- Information on how decisions are made / what criteria is used;
- Sensitivity in the communication of a declined application; and
- Feedback on reasons for declining a grant application, including what applicants should do differently.

What OTF Is Doing

Improvements to the process of declining applicants. OTF now has an Early Declines Strategy to improve the process of declining applications and providing earlier notice to applicants. This strategy includes:

- Tools for declined applicants on the OTF website;
- Additional information in the decline letter to help applicants better understand why their application was declined;
- Revisions to the review process so that OTF can identify applicants who will be declined sooner, and advising them that their application has been declined earlier in the process; and
- Counselling for organizations that have been declined, particularly for applicants such as Francophones, who, according to the study, most want this support.

OTF will review and adjust this strategy as necessary.

Revisions to the application process. The Foundation introduced a Simplified Application Process for Small Capital Grants. OTF is also implementing the recommendations of a Business Review Plan to improve and streamline all business processes so they reflect best practices and incorporate automation as appropriate.

Ongoing improvements to customer service standards. OTF continues to review and assess its customer service practices to identify opportunities for improvement.

Setting up more realistic expectations. OTF is enhancing information on its website and in its communications to include the message that OTF funds are in great demand and that the competition for OTF grants is great.

Reaching out to Francophone applicants. OTF has increased its efforts to raise public awareness of OTF investments in Francophone communities. It is clustering grant announcements so the Foundation can raise awareness of a number of Francophone activities concurrently. In addition, OTF volunteer training will include more education about Ontario's Francophone community. This will help all OTF staff make more informed decisions.