**Executive Report**

Data-Informed Funding Streams &  
Simplified Grant Applications

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# Introduction

The Ontario Trillium Foundation (OTF) is one of Canada’s leading granting bodies, with over $730M invested in more than 5K projects helping Ontarians. With four main grant programs, each with unique funding, the agency handles an immense about of data from applications. A key responsibility lies in carefully allocating financial resources. Applicants select a program, apply, and if successful, receive an award from a one of the program’s funding streams.

# Business Objectives

Budget misallocation is a significant financial concern. More important, as a public agency, ensuring the best use of funds is a priority for the OTF. With several funding streams per grant program, it is important to certify that streams accurately represent the expenditures from each funded project. In addition, OTF funds must be fairly distributed across eligible applications. Rejecting applications due to user error, as when an applicant selects an incorrect grant program although their request would be otherwise eligible, limits access to funds and places undue burden on applicants. Removing this barrier is desirable.

The assumptions are that misconceived funding streams might not appropriately support the real needs of applicants, and that otherwise eligible applications will be rejected if an incorrect grant program is selected. In response, the objective is three-fold:

### Determine the most representative funding streams. Funding streams created to fit applicants’ requests, and not the other way around, can improve budget allocations [[1]](#footnote-1).

### Reveal patterns in funding stream changes over time. Understanding how requests for each stream have evolved can inform decision-making and suggest future trends.

### Create a system that sorts general applications into exisiting grant programs. Completing a grant application is not a simple process. Allowing applicants to complete a global application, rather than an application to a particular grant program, and sorting internally instead simplifies the process. It also ensures all eligible applications are appropriately funded.

# Results

## Determine most representative budget streams.

Our clustering model determined X funding streams. These are an improvement from X current streams. Fig. 1 shows X. (Include performance metrics or additional model details and benefits.)



1. Placeholder

## Reveal patterns of funding stream changes over time.

(Description). (Significance.) Fig. 2 shows X. (Include performance metrics or additional model details and benefits.)



1. Placeholder

## Create a system that sorts general applications into exisiting grant programs.

Lastly, our machine learning model can predict with reliable accuracy (X) which program grant an application is best suited for. Should we use mere chance, we would only have a correct match in (X%) of instances. Fig. 3 shows X. (Include performance metrics or additional model details and benefits.)



1. Placeholder

1. Footnotes, citations [↑](#footnote-ref-1)