

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2021 – March 31, 2022

COMMUNITY FUTURES ONTARIO WILL DELIVER RELEVANT PRODUCTS & SERVICES THAT SUPPORT CFDCs				
Strategies to Provide Professional Development				
Objectives to Providing Professional Development: <ul style="list-style-type: none"> • Improve the retention rate of CFDC Staff • Attract new staff and volunteers to CFDCs • Increase the number of credentialed CFDC staff professionals • Strengthen skills & awareness in corporate governance, information management/information technology & community economic development 		Key Measures: <ul style="list-style-type: none"> ✓ 50% of all CFDC staff participate in at least one professional development event annually • Increased capacity of CFDC staff and boards to deliver on Government of Canada Priorities (Innovation, Advanced Manufacturing, Agri-Food & Food Processing, Clean Technologies, Digital Industries, Health & Biosciences, Inclusiveness, Tourism) ✓ Two (2) general plus one (1) marketing & social media training session or workshop coordinated with regional networks ✓ Two (2) training sessions facilitated in collaboration with outside training or certification courses ✓ One (1) professional development event facilitated ✓ 30% participation in PD needs survey • 20% increase in # of CFDC staff certified • Retention of staff yr over yr • Growth of key activities of CFs 		
KEY ACTIONS	BY WHOM	BY WHEN	STATUS UPDATE	
		Quarter/Priority		
A-1: Offer refresher training of common topics				
<ul style="list-style-type: none"> • Facilitate Pan Northern and Pan Southern session delivery throughout the province 	PD Ctee (PD)/ Regional Networks (RN)	2 nd	High	<ul style="list-style-type: none"> • PD committee meeting to share regional training plans for the fall • Effective virtual leadership training through E-lead with 17 CF staff (6-W,3-E,8-NE) • PD committee meeting to share regional schedules and HR resources • PD event at AGM - Dr. Ryan Gibson, University of Guelph, "Where to from here?" Local economic development trends insights and implications with 55 attendees • Four (4) CF staff pursued CuSource financial training
A-2: Investigate other sources of training and different delivery methods				
<ul style="list-style-type: none"> • Develop content for 2022 National Event in conjunction with Provincial CF Associations and Regional Development agencies (RDAs) using: • Common "request for proposals" with objective scoring • Facilitated discussion groups; Expert speakers using tangible examples of practice • 4 themes: Board practices, Operational practices, CED practices & Emerging opportunities 	2022 National Event Planning Committee	1 st	High	<ul style="list-style-type: none"> • Preliminary workshop content schedule developed with 35 session topics identified • CF National Event registration live on June 18th – 909 room nights (65%) booked, 67 delegates (17%) • Partnership package to key suppliers • 3 keynotes selected, 23 workshop sessions confirmed • Monthly financial analysis • Registration website enhanced and re-translated • Inspirational video & history of CFP montage underway • BY Sep 15th - CFNE early bird registration 331 (77% of breakeven) – 1362 room nights (70% of quota)

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				<ul style="list-style-type: none"> Secured \$57,000 in sponsors for CFNE Registrations by March 31 – 475 + 45 guests=520 32 workshop/discussion group sessions confirmed; 4th keynote confirmed Site visit to confirm A/V, SI, Venues Projected net income \$50,000 Continued liaison with Quebec colleagues Secured bilingual emcee familiar with CFP
A-3: Undertake professional development needs survey annually for Board and Staff				
<ul style="list-style-type: none"> Use Survey Monkey for training needs to staff and board members Collaborate with RNs on 2021/2022 training sessions 	PD/CFDCs	3 rd	High	<ul style="list-style-type: none"> Training needs survey 64 board members from 23 CFs & 81 staff from 35 CFs Regional analysis of survey results shared with networks
A-4: Produce an annual salary and benefits survey				
<ul style="list-style-type: none"> Continually refine annual web-based survey 	CFO/CFDCs ED	1 st	High	<ul style="list-style-type: none"> New secure platform used to conduct salary survey 82% completion rate, results posted to website
A-5: Track the impacts of the professional development/training				
<ul style="list-style-type: none"> Develop process to track impacts and not just outcomes (staff progress through various positions in a CFDC based on accomplishment of competencies) Market the value of CFLI staff certification 	CPC CFDCs CFLI	4 th	Medium	<ul style="list-style-type: none"> Not completed
Strategies to Meet Members' Service Needs				
Objectives in Meeting Members' Service Needs: <ul style="list-style-type: none"> Increase participation in group purchasing plans to reduce costs Increase CFDC satisfaction with group purchasing plans 		Key Measures: <ul style="list-style-type: none"> ✓ CFDCs provide genuine feedback to CFO on Member Services ✓ Savings to CFDCs participating in: <ul style="list-style-type: none"> ✓ Desjardins Health Benefits Plan Manulife Structured Retirement Savings Plan ✓ National D&O/E&O/Professional Liability Insurance Plan ✓ Savings to CFDCs purchasing services from CommonGoals, Bulletproof or Fern ✓ Savings to CFDC clients purchasing Valeyo's Group Credit Life Insurance/ Disability Rider Insurance • # of concerns raised in quarter/year for each service 		
KEY ACTIONS	BY WHOM	BY WHEN	STATUS UPDATE	
		Quarter/Priority		
B-1: Ask "What else?" or "What could CFO do better?" when attending Regional Network meetings				
<ul style="list-style-type: none"> Structure regional network agendas to allow for discussion Ensure there is staff capacity to respond when asking 	RN	Ongoing		<ul style="list-style-type: none"> Added Post Covid "reopening" resources to website for CFs Vaccination protocol survey to members MIS policies & procedures updated and posted to website

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2021 – March 31, 2022

B-2: Demonstrate annual savings from CFDC participation in CFO group purchasing plans				
<ul style="list-style-type: none"> Annual Survey to CFDCs participating in the programs to determine savings based on RFPs to other suppliers 	CFO CFDCs	4 th		<ul style="list-style-type: none"> D&O/E&O, cyber insurance investigations underway with PanWest colleagues Valeyo investigating loan client insurance options for PanWest CFs Unable to secure insurance quotes due to varying renewal dates of multiple policies – recommendation to align renewals before insurers will quote Cost of insurance licensing precludes offering Valeyo insurance in Sask & Man
B-3: Report regularly on various service offerings (professional development, group purchasing plans, affinity plans)				
<ul style="list-style-type: none"> Report on CFDC participation in affinity programs Report on available discounts 	MIS/Benefits Committees	4 th		<ul style="list-style-type: none"> Member's survey for changes to health plan benefits with (40 of 170) 50% participation Health plan renewed with increased coverage and 5.6% rate increase
B-4: Close the loop on information with immediate and resultant impacts tracking				
<ul style="list-style-type: none"> Report in CFO monthly update on progress 	ED	Ongoing		<ul style="list-style-type: none"> Salary survey and committee meeting results shared in monthly update Results of Sep 30th and double vaccination survey (73% response rate) reported to members
B-5: Produce webinars about group purchasing plans				
<ul style="list-style-type: none"> Work with suppliers to develop videos describing their offerings and post to CFO website 	FMPO CPC	Ongoing		<ul style="list-style-type: none"> Webinars/links: <ul style="list-style-type: none"> Cyber security insurance webinar link How to use Health Benefits Omni app ACCESS Employment on liaising with professional immigrants for rural

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2021 – March 31, 2022

COMMUNITY FUTURES ONTARIO WILL STRENGTHEN CFDCS' CAPACITY TO RESPOND TO OPPORTUNITIES				
Strategies to Enable Responses to Opportunities				
Objectives for Enabling Responses to Opportunities: <ul style="list-style-type: none"> Increase communication of opportunities for CFDCs to pursue delivery of complimentary services Provide information package describing CFDC delivery capacity 			Key Measures: <ul style="list-style-type: none"> \$ impact of partnerships for CFDCs ✓ # of partnership opportunities implemented - 2 ✓ # of partnership opportunities identified - 1 ✓ # of briefings to stakeholders - 2 ✓ # of case studies presented - 1 ✓ Sixteen (16) Regional Network Meetings attended (virtual or in person) - 29 ✓ Four (4) joint network meetings facilitated - 1 	
KEY ACTIONS	BY WHOM	BY WHEN		STATUS UPDATE
		Quarter/Priority		
C-1: Develop strategies for partnership opportunities				
<ul style="list-style-type: none"> Develop a process with Regional Networks on how to respond effectively to partnership opportunities (ie Regional profiles of CF capacity) 	CFO RN	4 TH	High	<ul style="list-style-type: none"> Investigation with regions on application to digital adoption program call for submissions – resulted in support letters to Digital Mainstreet application Investigation with regions on application to Women's Entrepreneurship Loan Fund resulted in PanWest/Ontario CF collaborative submission (\$5,000 Board Reserve contribution to proposal writing)
C-2: Engage FN/FDO on emerging opportunities				
<ul style="list-style-type: none"> Use monthly CFO Board meetings to request updates on emerging opportunities Participate in CFP Modernization discussions with FDO/FN 	CFO FDO/FN	Ongoing		<ul style="list-style-type: none"> CFP modernization calls (9) + 1 for West Region
C-3: Facilitate partnership ideas for groups of CFDCs				
<ul style="list-style-type: none"> Support investment fund efficiencies through common online loan intake and application processes 	CFO	Ongoing		<ul style="list-style-type: none"> MIS discussions with software suppliers re client facing online loan application Identification of legal issues for loan application database hosting MIS discussions re Bulletproof 365 cyber security for Ontario CFs
C-4: Solicit case studies from CFDCs implementing operating efficiencies				
<ul style="list-style-type: none"> Request best practice case studies from CFDCs on virtual office settings; cloud data management; co-share workspace; EFT payments; electronic signature Presentations at regional conferences 	CFO CFDCs	Ongoing		<ul style="list-style-type: none"> Recommendation approved for website modifications to simplify navigation for members only

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders

April 1, 2021 – March 31, 2022

C-5: Share information on Regional Network activities				
<ul style="list-style-type: none"> Quarterly meetings with CF Ontario Board 	RN CFO	Quarterly	High	<ul style="list-style-type: none"> Meeting to confirm strategic initiatives with regional networks Ten (10) FDO & Three (3) FN meetings with CFs Twenty-Nine (9+7+7+6) regional network meeting (11 West/12 East/ 2 NW/4 NE)
C-6: Brief stakeholders on CFDC delivery capacity				
<ul style="list-style-type: none"> Develop briefing note to share across government Departments and Ministries 	CFO CFDCs GR Committee	1 st	High	<ul style="list-style-type: none"> Meeting with Centre for Rural Economic Development (CENRED) policy unit re new stats can data tools for rural Partnership with Conseil de la Cooperation de l' Ontario on bilingual jobimpact.ca employment project CENRED re transition from infrastructure to ISED Presentation to University of Waterloo Local Economic Development master's class CENRED re CF capacity as federal govt liaison in rural Mbr of Univ of Waterloo Disruptive Ag Tech research study
Strategies to Build Members' Capacity				
Objectives for Building Members' Capacity		Key Measures:		
<ul style="list-style-type: none"> More member engagement in CFO committees More member engagement in CFO campaigns More member engagement in CFO surveys 		<ul style="list-style-type: none"> ✓ Summaries of "so what" are you getting out of this activity - 12 # of different staff and board involved in CFO Committees # of responses to surveys # of personalized phone calls with CFDCs # of Facebook likes for video message # of re-tweets of CFO messages ✓ Two (2) in person or virtual meetings facilitated or coordinated for CFDC staff (Managers, administrators and loan officers) - 1 		
KEY ACTIONS	BY WHOM	BY WHEN		STATUS UPDATE
		Quarter/Priority		
D-1: Contact each CFDC annually (CFO Board to Board, Board to Manager)				
<ul style="list-style-type: none"> Consider quarterly contact to keep up with current issues Report regional feedback at CFO Board meetings 	CFO Directors CFDCs	Ongoing	Medium	<ul style="list-style-type: none"> Monthly update reports (12) distributed to each CF by CFO board members
D-2: Facilitate member forums at CFO AGM				
<ul style="list-style-type: none"> Use Adobe Connect to deliver virtual AGM Use online Audience Response for member forums 	CFO CFDCs	3 rd		<ul style="list-style-type: none"> Annual General Meeting with 55 participants (45 voting members) Stakeholder report to members
D-3: Prioritize emails as Important/Response Required and Reminder				
<ul style="list-style-type: none"> Post monthly updates to website for CFDCs to reference 	ED	Ongoing		<ul style="list-style-type: none"> Newsletter posted monthly (12)

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2021 – March 31, 2022

COMMUNITY FUTURES ONTARIO WILL ADVOCATE FOR THE NEEDS OF RURAL COMMUNITIES

Strategies to Dialogue with Key Stakeholders

Objectives for Dialoguing with Key Stakeholders:		Key Measures:	
<ul style="list-style-type: none"> Increase understanding of Community Futures Program by all levels of government Gain ready access to key decision makers Combine efforts with Like-minded advocates (Regional, Provincial, National Networks & Organizations) 		<ul style="list-style-type: none"> Increases or changes in CFDC operating funding ✓ # of information inquiries from government - 1 ✓ # of meetings with politicians - 6 # of board members engaged in promoting the Community Futures Program 	
KEY ACTIONS	BY WHOM	BY WHEN	STATUS UPDATE
		Quarter/Priority	
E-1: Collect information from CFDCs that relate to rural issues - What do you think are the most important issues to be addressed?			
<ul style="list-style-type: none"> Liaise with Rural Partner Associations CFDC office analysis Participate in Fed Govt Rural Committee work, Programs, Initiatives, etc. MP Meetings 	RN CFO CFNC	Quarterly Reports/ Annual Plan/ Government Budget Cycle	<ul style="list-style-type: none"> Meetings with PS Lalonde, MP Melillo & MP Gladu on increased CFP funding in 2021 budget Through CCEDNet People Centered Economy group (PCE) meetings with CANNOR, ACOA, FEDNOR, WED and ESDC on social finance recommendations Meeting with Pillar Non-Profit on advocacy and sustainable funding issues Canada 2020 rural policy webinar Meeting with FDO Minister Jaczek Consultation with Rural Ont Municipal Assoc (ROMA) on opportunities for rural Ontario in a post-covid world Liaison with Minister Hutchings office re May 9th "Rural & Remote Opportunities" event for MPs Meeting with MP Karen Vecchio re advice for May 9th event for MPs Draft MP toolkit for May 9th invites
E-2: Undertake meetings with Senior Directors of Regional Development Agencies & Provincial Ministries			
<ul style="list-style-type: none"> Understand Government Priorities and Cycles to schedule meetings 	CPC RN CFO Directors	4th	<ul style="list-style-type: none"> Meeting with FDO Deputy Minister Gardiner Member of FDO My Mainstreet governance council with EDCO and Cdn urban inst. (cui)
E-3: Prepare an information package for CFDCs with statistics on rural and urban economies			
<ul style="list-style-type: none"> Identify targets for information packages 	CPC RN	Annual	<ul style="list-style-type: none"> RRRF summary reports/National RRRF infographics Ontario RRRF and CFP statistics for CFNC annual report Infographics for Ontario RRRF and CFP statistics for Apr 2020 – March 2021 CFP & RRRF pull up banners for CFNE & May 9TH MP Event
E-4: Develop a strategy & implementation plan that encourages a continuous process of engagement with MPs/MPPs			
<ul style="list-style-type: none"> Strategy development with GR Committee Develop toolkits for CFDCs as required 	Government Relations	Ongoing	<ul style="list-style-type: none"> CFNC representation committee planning for pre-budget submission

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	Committee (GR)			<ul style="list-style-type: none"> CFNC de-briefing on 2021 MP toolkit Review of CFNC pre-budget submission to FINA Circulate CFNC election kit and party responses Draft national operating costs survey Post-election MP toolkit for Ontario CFs Report & meeting with S. Ont CFs re messaging for meetings with FedDev critic MP Philip Lawrence CFNC meeting with Summa Strategies on CFP messaging with 7 ministers and May 9th MP event National operating cost survey completed by 49/60 (82%) of Ontario CFs; 200/267 (75%) of all CFs; Ontario regional results anonymized and shared with 4 regions
E-5: Report on impacts of MP/MPP Meetings – Ontario and Canada-wide				
<ul style="list-style-type: none"> CFDCs return MP/MPP meeting summaries to CFO CFO compile & report trends to CFDCs/GR to adjust strategies 	CFDCs CFO GR	Ongoing		<ul style="list-style-type: none"> Monthly report on CFO and CFNC advocacy activities (12)
COMMUNITY FUTURES ONTARIO WILL COMMUNICATE THE CFDCS' ABILITIES AND RESULTS				
Strategies to Market the Community Futures Brand				
Objectives for Marketing the Community Futures Brand: <ul style="list-style-type: none"> Ontario's CFDCs are top of mind when rural entrepreneurs are seeking business assistance Ontario CFDCs are preferred partners at all levels – local, regional, provincial Ontario CFDCs are known by a common name similar to other regions of Canada within the Community Futures Program 		Key Measures: <ul style="list-style-type: none"> # of bank referrals to CFDCs # of new partnerships initiated with CFDCs ✓ # of CFDCs using "CF of ____" branding protocol - 2 ✓ # of success stories/videos published - 6 Increased website statistics ✓ Three (3) targeted themes for targeted outreach and/or promotional communications ✓ Twenty-four (24) targeted outreach and/or promotional communications ✓ Twelve (12) success stories/videos published ✓ Four (4) summaries of digital platform metrics 		
KEY ACTIONS	BY WHOM	BY WHEN		STATUS UPDATE
		Quarter/Priority		
F-1: In conjunction with Regional Network, investigate the cost and opportunity of undertaking "public" marketing				
<ul style="list-style-type: none"> Convene meetings of Regional Network marketing Committee to encourage a coordinated effort, identify global and regional opportunities to market the Community Futures brand 	CFO RN CFNC	Quarterly	High	<ul style="list-style-type: none"> Meeting with RNs identified requirement to request input from CFDCs on their specific communications needs Meetings (4) with West & East RNs on collaborative opportunities
F-2: Inventory marketing examples – "Community Futures of ____"				
<ul style="list-style-type: none"> Request sample logo specs and communication material from CFs using new branding House sample materials on CF Ontario website 	CFO	Ongoing	Medium	<ul style="list-style-type: none"> Regional name conversion to CF Northwestern Ontario Regional name conversion to CF Western Ontario

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
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F-3: Consolidate CFDC results compared to bank or non-CFDC assisted clients				
<ul style="list-style-type: none"> Report on loan activity across CFDCs Marketing of results 	CFO FDO/FN	Annually	Medium	<ul style="list-style-type: none"> New public facing website with CFP, RRRF statistics, GPS mapping links to "Find Your Local CF", success stories, stats on CF assisted vs non-assisted business stats
F-4: Promote existing relationships of marketing collaboration ie Business Development Bank, Small Business Enterprise Centres				
<ul style="list-style-type: none"> Develop impact measures of cross promotion referrals on CFO Website 	CFO with BDC & MEDG	1 st	Medium	<ul style="list-style-type: none"> ED meetings (2) with BDC liaison ->referral to OBIAA project manager
Strategies to Communicate CFO's Value Proposition				
Objectives for Communicating CFO's Value Proposition			Key Measures:	
<ul style="list-style-type: none"> CFO uses the most effective communications tools All Ontario CFDCs are members of CFO CFO recruits' leaders as board members 			<ul style="list-style-type: none"> ✓ Increase in # of member organizations ✓ Increase in annual conference attendance ✓ Open and share rate of digital media tools (benchmark and compare) • Increase in group plan participation • Multiple nominations for CFO Board Representatives • Four (4) quarterly reports showcased on CF Ontario website for member CFs • One (1) market research or stakeholder/demographic survey 	
KEY ACTIONS	BY WHOM	BY WHEN		STATUS UPDATE
		Quarter/Priority		
G-1: Promote CFO's value proposition externally				
<ul style="list-style-type: none"> Website Social media Partner events (CFNC, BDC, EDCO, CCEDNET) Federal & Provincial liaison 	CF Ontario	Monthly and/or Government Fiscal Cycle	Medium	Annual statistics: <ul style="list-style-type: none"> 692 Twitter total traffic (-716%) 2,015 Facebook engagement (-42%) 974 Instagram engagement (-50%) 35 LinkedIn engagement (-69%) 6,600 "Find your local CFDC" pageviews (-716%) Quarterly social media and web stats reports
G-2: Evaluate each of CFO's communication tools				
<ul style="list-style-type: none"> Implement upgrades to CFO website 	CFO RN CFNC	Ongoing	High	<ul style="list-style-type: none"> Board approved PR committee recommendation for \$2,000 investment in creating public facing and member only websites Public facing upgrades completed Registered Graphic Designers (RGD) Designathon competition to provide more diverse social media posts
G-3: Use Infographics targeted at the membership, regional networks, funders, staff, boards				
<ul style="list-style-type: none"> CFO Quarterly performance stats 	CFO	Quarterly	Low	<ul style="list-style-type: none"> Not completed
G-4: Use "so what" metrics of tangible activities that tie into the impact of the CF Program				
<ul style="list-style-type: none"> Monthly update report to members 	CFO	Monthly	High	<ul style="list-style-type: none"> Monthly update report (12) to members