

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders

April 1, 2020 – March 31, 2021

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 ✓ 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	STATUS UPDATE
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)	<ul style="list-style-type: none"> Leading through COVID-19 webinars from e-Leadership Academy – series of 5 sessions viewed by 326 live & 45 recorded from 53 CFs in (NE-16, E15, W-22 regions); Total cost \$5,197 paid by 3 regional networks = \$99.05 per CF or \$15.00/view Facilitated cost shared (RN - \$41,663, CFs - \$10,656) delivery of Loan Collections \$600pp (NW-7, NE-17, W-21, E-11) & Small Claims Court training \$400pp (NW-11, NE-14, W-26, E-14) Hosted cyber security case study presentation from Atlantic Canada with 57 participants Facilitated cost shared Cyber Security Awareness webinars - 27 North & 26 South CF participants (\$500 = \$21.38 pp)
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, Lending/Operational practices, CED practices & Emerging opportunities (Social Enterprise, Business Restructuring, etc.) 	2022 National Event Planning Committee	<ul style="list-style-type: none"> Confirmed National Event funding support from FDO Postponed to May 8 – 10, 2022 with renegotiated hotel contracts, updated website, revised business plan Initial RFP submissions for speakers (46 EN, 4 FR) under review by National planning committee

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A-3: Undertake professional development needs survey annually for Board and Staff		
<ul style="list-style-type: none"> Collaborate with RNs on 2020/2021/2022 training sessions Use Survey Monkey for training needs to staff and board members 	PD/ CFDCs	<ul style="list-style-type: none"> English Training needs survey: 84 Board 78 Staff responses French training needs surveys: 12 Staff, 6 Board responses Recommendations to PD Committee and Regional 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	<ul style="list-style-type: none"> Survey published with 83% participation
A-5: Investigate a Management Mentoring Program marketed to Boards and Staff		
<ul style="list-style-type: none"> Assess the needs across Ontario 	ED CFDCs	<ul style="list-style-type: none"> Declined approach by Boomersplus for client mentor placement option
A-6: Investigate online tools for CFDCs to do comparative salary reports of local/regional finance/economic development jobs		
<ul style="list-style-type: none"> Find effective online tools to do comparative salary reports 	CFP RN	<ul style="list-style-type: none"> Not yet completed
A-7: 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	<ul style="list-style-type: none"> Trained on CFLI staff certification platform Discussions with CF Prov Assoc Prof Dev Co-Ordinator's re shared course materials in both languages
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 => 5.2% decrease 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	STATUS UPDATE
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	<ul style="list-style-type: none"> Updated COVID-19 support information for CFs Created Regional Relief & Recovery Fund (RRRF) section of website to host templates & data reports Recommended East & West regional network discussions on impact of COVID-19 loan deferrals on future investment fund outcomes

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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	<ul style="list-style-type: none"> Appointed new Insurance Broker of Record to undertake review of current group commercial rate plans
B-3: Create “listening” & “telling” infographics based 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	<ul style="list-style-type: none"> Info graphic provided with membership renewals
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 	CPC ED	<ul style="list-style-type: none"> Incentives used for survey participation resulting in >70% response rates Survey results consistently reported in monthly update (training needs, salary, COVID-19 impact, Post-RRRF cashflow estimates)
B-5: Produce video messages 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 ED	<ul style="list-style-type: none"> Review of loan client insurance program & required annual re-certification training Health plan renewal with 5.2% decrease Annual review of structured RRSP performance Negotiated cyber security audit fee for southern CFs Implemented Alexa AI translation subscription at reduced initial fee
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 # of partnership opportunities identified => 4 # of briefings to stakeholders => 8 # of case studies presented => 2 ✓ Sixteen (16) Regional Network Meetings attended (virtual or in person) => 26
KEY ACTIONS	BY WHOM	STATUS UPDATE
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	<ul style="list-style-type: none"> Three (3) Southern CFs sessions on COVID-19 impact analysis; Survey and analysis report to support recommendations Post-RRRF cash flow survey and analysis by North/South to support admin fee recommendations
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 	CFO FDO/FN	<ul style="list-style-type: none"> Collating all Ontario RRRF data from FN/FDO and sharing with CFs Request to FDO/FN for ongoing RRRF operating funding Appointment of official languages, indigenous reps to FDO's CF Modernization Working Group

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		<ul style="list-style-type: none"> Request to FDO/FN for post-RRRF funding based on \$2,500 fee per client accepted
C-3: Facilitate partnership ideas for groups of CFDCs		
<ul style="list-style-type: none"> Request case studies from another province's CFDCs 	CFO	<ul style="list-style-type: none"> CFNC meeting with all provincial CF associations to share best practice Reviewed National RRRF delivery process and statistics
C-4: Solicit case studies from CFDCs delivering other programs		
<ul style="list-style-type: none"> Request case studies from CFDCs Presentations at national and regional conferences 	CFO CFDCs	<ul style="list-style-type: none"> Shared COVID-19 success stories through social media Presented CFP results to University of Waterloo Local Economic Development master's class Presented CFP model at Pillar Non-profit "Catalyze Social Finance" event
C-5: Share information on Regional Network activities		
<ul style="list-style-type: none"> Participate in Regional Network Meetings 	RN CFO	<ul style="list-style-type: none"> Twenty-Six (26) Regional Network Members' meetings (13 – East, 12 – West, 1 - Northeast) Eighteen (18) FDO Meetings with Southern CFs; Eight (8) FN Meetings with Northern CFs
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	<ul style="list-style-type: none"> Meetings with PS Kate Young on COVID-19 impacts in rural communities and on Inclusive Growth Fund re-application to FedDev with Pillar Non-Profit Developed CFNC partnership proposal to BDC for COVID-19 response funding Participated in CFNC pre-budget submission Facilitated CFNC call with ESDC social finance policy branch Two (2) meetings with potential social finance Partners (NIIPt and SVX) SI/SF strategy webinar with CCEDNet Four (4) meetings with Centre for Rural Economic Development (CENRED) policy unit Meeting with Social Economy Through Social Inclusion (SETSI)

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Strategies to Build Members' Capacity		
Objectives for Building Members' Capacity <ul style="list-style-type: none"> • More member engagement in CFO committees • More member engagement in CFO campaigns • More member engagement in CFO surveys 		Key Measures: <ul style="list-style-type: none"> • Summaries of "so what" are you getting out of this activity • # of different staff and board involved in CFO Committees • # of responses to surveys=> consistently 80% • # of personalized phone calls with CFDCs • # of Facebook likes for video message • # of re-tweets of CFO messages <p>NA - Two (2) in person or virtual meetings facilitated or coordinated for CFDC staff (Managers, administrators and loan officers)</p> <p>✓ Three (3) joint network meetings facilitated</p>
KEY ACTIONS	BY WHOM	STATUS UPDATE
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 • Bi-Annual face to face meeting with CF Ontario Board 	CFO Directors CFDCs	<ul style="list-style-type: none"> • Postponed F2F meeting, replaced with regular northern and southern Ontario CF meetings with FedNor and FedDev • Twelve (12) monthly update reports distributed to each CF by CFO board members • Joint CFO/regional network environmental scan discussion; followed by facilitated strategic outcomes workshop with regional networks/FDO/FN; and initiatives planning discussion with regional networks
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	<ul style="list-style-type: none"> • Successful virtual AGM using Adobe Connect with subsequent inquiries from CFs to use the platform
D-3: Create a monthly "Listening" & "Telling" infographics surveys based on opportunity offering (PD, PR, Benefits, Burning Issues)		
<ul style="list-style-type: none"> • Limit to one topic with 2 -3 quick questions 	CPC ED	<ul style="list-style-type: none"> • Published within 12 monthly newsletters
D-4: Prioritize emails as Important/Response Required and Reminder		
<ul style="list-style-type: none"> • Post monthly updates to website for CFDCs to reference 	ED CPC	<ul style="list-style-type: none"> • Monthly updates and newsletter posted to website

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COMMUNITY FUTURES ONTARIO WILL ADVOCATE FOR THE NEEDS OF RURAL COMMUNITIES		
Strategies to Dialogue with Key Stakeholders		
Objectives for Dialoguing with Key Stakeholders: <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) 		Key Measures: <ul style="list-style-type: none"> • Increases or changes in CFDC operating funding • # of information inquiries from government • # of meetings with politicians => 6 • # of board members engaged in promoting the Community Futures Program
KEY ACTIONS	BY WHOM	STATUS UPDATE
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	<ul style="list-style-type: none"> • Participated in University of Waterloo "Social Enterprise as a Business Succession Tool" research project • Facilitated CFNC research on "Finance Needs of Social Purpose Organizations in Rural Communities" • Met with EDCO, OBIAA, TIAO to review partnership opportunities; follow up with OBIAA re digital Mainstreet Initiative • Social Finance Fund delivery framework developed with CFNC
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	<ul style="list-style-type: none"> • Attended 2 teleconference meetings with Minister Joly regarding RRRF announcements • Participated in MP Ryan Turnbull Social Innovation Caucus consultation • Participated in MP Sean Frazer meeting re Social Finance agenda • Meeting with Minister Monsef + 3 CF reps on increased CFP funding in 2021 budget • Meeting with MP Nater + 3 CF reps on increased CFP funding in 2021 budget • April meetings arranged with PS Lalonde, MP Melillo & MP Gladu on increased CFP funding in 2021 budget
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	<ul style="list-style-type: none"> • COVID-19 Initial Impact Report • RRRF summary reports weekly; Phase 1 and Phase 2 Infographics
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 	GR Committee (GR)	<ul style="list-style-type: none"> • CFNC letter re CFs as eligible financial institutions to deliver recovery funding • MP Toolkit with 2019/20 lending stats, quick facts sheet & RRRF achievements for CFs to use locally • Supported CFNC annual report in digital format • Pre-budget MP Toolkit 2021 with CFNC • Updated CF Ontario MP Toolkit 2021

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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	<ul style="list-style-type: none"> Monthly report on CFNC advocacy activities Monthly report on CF Ontario advocacy activities
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 Increased website statistics ✓ Three (3) targeted themes for targeted outreach and/or promotional communications ✓ Twenty-four (24) targeted outreach and/or promotional communications => 200 shared across 4 platforms ✓ Twelve (12) success stories/videos published => 20 ✓ Four (4) summaries of digital platform metrics 	
KEY ACTIONS	BY WHOM	STATUS UPDATE
F-1: Investigate the cost and opportunity of undertaking "public" marketing		
<ul style="list-style-type: none"> Using a coordinated effort, identify and then target participation based on key events/opportunities, both global (all CFDCs) opportunities, and also regional specific drivers/local economies (Marketing SWOT by CFO and by Reg CFs) 	CFO RN CFNC	<ul style="list-style-type: none"> Monthly meetings with Regional Network coordinators on communications opportunities Apr 2020 to March 2021 – quarterly digital platform metrics report to board
F-2: Produce monthly "Another example of CFDCs supporting innovation"		
<ul style="list-style-type: none"> Develop Social Media & News Media templates Develop templates for loan or payout announcements to the public and MPs 	CFO RN	<ul style="list-style-type: none"> Daily social media posts being shared regularly by CFs (560 Facebook posts, 490 tweets, 266 Instagram posts, 244 LinkedIn posts) Twenty (20) success stories published in newsletter & social media
F-3: 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	<ul style="list-style-type: none"> Posting of regional communications resources to CFO website Discussion with regional networks about common branding templates for videos and social media success stories
F-4: 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	<ul style="list-style-type: none"> Internal sharing of RRRF stats Infographics of RRRF & 2019-2020 lending statistics (provincial, north, south) Infographics of RRRF 2020-2021 statistics (provincial, north, south)

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F-5: Approach a social media subcommittee to engage different audiences		
<ul style="list-style-type: none"> Create global and segmented target audiences for specific medium and messages across a timeline 	RN/CFO Marketing Committees	<ul style="list-style-type: none"> Discussion with regional networks about shared social media strategy
F-6: 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	<ul style="list-style-type: none"> Re-sold access to Alexa AI translation subscription to SBEC online learning project Fielded an average of 2.5 calls per day (70% from BDC referrals for startup assistance that are not rural potential clients)
Strategies to Communicate CFO's Value Proposition		
Objectives for Communicating CFO's Value Proposition <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 		Key Measures: <ul style="list-style-type: none"> Increase in # of member organizations => +1 Increase in annual conference attendance => NA Open and share rate of digital media tools (benchmark and compare) => 31% open rate for newsletter 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	STATUS UPDATE
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	<ul style="list-style-type: none"> "Find your local CFDC" + 457.5% (5,087 to 23,271); "Member Office" Maps + 305.6% (3,431 to 10,484) 3,500 Facebook engagements, +18% likes (497 to 603); 1,400 Twitter engagements, +14% followers (954 to 1114); 1,300 Instagram engagements, +444 followers; 115 LinkedIn engagements, + 59 followers
G-2: Evaluate each of CFO's communication tools		
<ul style="list-style-type: none"> Investigate ROI of one coordinated website for Ontario CF Universal CF Branding 	CFO RN CFNC	<ul style="list-style-type: none"> Member survey of CFO website and social media (49 responses)
G-3: Use Infographics targeted at the membership, regional networks, funders, staff, boards		
<ul style="list-style-type: none"> CFO Quarterly performance stats 	CFO	<ul style="list-style-type: none"> Quarterly reports and annual summary posted
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	<ul style="list-style-type: none"> Monthly update report to members with survey results, RRRF stats, and items requiring CF follow up

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