

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2022 – March 31, 2023

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 ✓ 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 <ul style="list-style-type: none"> • 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) <ul style="list-style-type: none"> • One (1) professional development event facilitated <ul style="list-style-type: none"> • 30% participation in PD needs survey • 20% increase in # of CFDC staff certified <ul style="list-style-type: none"> • 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 	CFO/Regional Networks	<ul style="list-style-type: none"> • Shared schedule of planned regional training sessions
A-2: Investigate other sources of training and different delivery methods		
<ul style="list-style-type: none"> • Deliver the 2022 National Event in conjunction with Provincial CF Associations and Regional Development agencies (RDAs) using: • 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 2023 CF Ontario Conference Planning Committee	<i>2022 Community Futures National Event May 8 – 10, 2022:</i> <ul style="list-style-type: none"> • Secured \$90,500 from 14 sponsors • Registrations - 494 + 50 guests=544 + 60 MPs = 604 • 32 workshop/discussion group sessions confirmed • Evaluation surveys – 153 (30%) overwhelmingly positive • Audit complete with income of \$28,968 to Board Fund and \$88,968 to CFNC (\$60,000 deposits refunded + 50% of net income) <i>CF Ontario Conference 2023 to March 31, 2023:</i> <ul style="list-style-type: none"> • Hotel deposit, registration software, monthly committee meetings, keynote speakers, budget, secured \$55,000 in partner contributions; registrations 151, 88% of room block, released balance no penalty • Political invites extended
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 2022/23 training 		<ul style="list-style-type: none"> • Regional Networks undertook their own survey process and planned sessions for their members accordingly
A-4: Produce an annual salary and benefits survey		
<ul style="list-style-type: none"> • Continually refine annual web-based survey 	CFO/CFDCs	<ul style="list-style-type: none"> • Publish annual salary survey with 85% participation • Meeting with National Aboriginal Capital Corporations Association (NACCA) HR consultants re salary surveys

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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 Market the value of CFLI staff certification 	CFO CFLI	<ul style="list-style-type: none"> Mailed Certificates to participants in CFLI sessions
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 purchasing services from CommonGoals, Bulletproof or Fern ✓ Savings to CFDC clients purchasing Valeyo's Group Credit Life Insurance/ Disability Rider Insurance ✓ Savings to CFDCs participating in: <ul style="list-style-type: none"> ✓ Desjardins Health Benefits Plan ✓ D&O/E&O/Professional Liability Insurance Plan <ul style="list-style-type: none"> Manulife Structured Retirement Savings Plan # 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 	CFO	<ul style="list-style-type: none"> Sharing of CFP modernization discussions from Southern Ontario with Northern Ontario CFDCs Discussion with FedNor on policy changes for investment fund draws, earned income & RRRF repayments
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"> No survey completed
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	<ul style="list-style-type: none"> Membership renewal letter with savings and affinity program information Health benefits renewal at 4.9% increase Investigating new health plan rates with Community Benefit Trust Subscription renewal with Alexa AI confirmed for April 1, 2023 Committee recommendation to stay with Desjardins for health insurance, no change to age 65 reduction of LTD & Life insurance coverage
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 	CFO	<ul style="list-style-type: none"> Status reports on operating costs survey, salary survey and national event results Advised members of ransomware attack and possible impact on personal information stored in RRSP participant database file on CFO's server Completed Privacy Commissioner filings and closed file Cybersecurity training for CFO staff
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 	CFO	<ul style="list-style-type: none"> Webinar for CFs not yet using Valeyo client loan insurance My Mainstreet information webinar for CFs

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		<ul style="list-style-type: none"> • Presentation to 2 CFs re implementing Valeyo client loan insurance
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"> ✓ # of partnership opportunities implemented - 1 ✓ # of partnership opportunities identified - 1 ✓ # of briefings to stakeholders - 3 ✓ # of case studies presented - 2 ✓ 22 vs 16 Regional Network Meetings attended (virtual or in person) ✓ 1 vs 4 joint network meetings facilitated
		<ul style="list-style-type: none"> • \$ impact of partnerships for CFDCs
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 	CFO RN	<ul style="list-style-type: none"> • Ongoing discussion with East & West networks on opportunities for collaboration • Exploration with EDCO (4 meetings) to include Regional Networks in my Mainstreet 2.0 submission to FedDev
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	<ul style="list-style-type: none"> • CFP modernization calls (13) • CFP strategic subcommittee meetings (4) • RFP for modelling consultant • Operating cost survey analysis report • CFP strategic meetings with networks (3) • FedDev meeting to announce funding increase
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	<ul style="list-style-type: none"> • Exploration of real time CFP investment fund data reporting • Partnership Agreement with "OWNER" website link for CFs to generate external revenue from referrals
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	<ul style="list-style-type: none"> • Exploration of Managed IT, cloud storage and data management services with existing suppliers • Terms of reference for Managed IT subcommittee • Completed IT inventory survey, prepared RFP & solicited 5 vendors; Committee review of 3 RFP responses • Recommendation to Board for negotiations with winning bid supplier • Three-year submission to FedNor for MIS funding support including enhanced Managed IT, loan software licensing, support & hosting • Performance Reporting Portal submission to FedDev • Delivery of Infrastructure upgrade funding for 25 Northern CFs
C-5: Share information on Regional Network activities		
<ul style="list-style-type: none"> • Quarterly meetings with CF Ontario Board 	RN CFO	<ul style="list-style-type: none"> • Twenty-Two (22) regional network meetings (8 West, 10 East, 2 NW, 1 NE, 1 NW/NE)

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		<ul style="list-style-type: none"> Regional network meeting with CFO board
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"> Call with Minister Jazcek re federal budget Coordinated National Event MP invitation toolkit resulting in 60 members in attendance from across Canada Meetings with Minister Jazcek & Minister Hutchings at CF National Event Thank you letter to Ministers Briefing with Minister Hutchings in preparation for her OECD presentation
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 responses to surveys <ul style="list-style-type: none"> # of different staff and board involved in CFO Committees # of personalized phone calls with CFDCs Two (2) in person or virtual meetings facilitated or coordinated for CFDC staff (Managers, administrators and loan officers) 	
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 	CFO Directors CFDCs	<ul style="list-style-type: none"> Monthly update reports (10) distributed to each CF by CFO board members Reporting of regional feedback at CFO Board meetings
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"> Virtual AGM with more than 50 attendees Introduction to upcoming strategic planning process for 2023-2028
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 	CFO	<ul style="list-style-type: none"> Newsletter posted monthly (12)
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 - 3 ✓ # of meetings with politicians - 4 ✓ # of board members engaged in promoting the Community Futures Program – 20 	
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. 	CFO CFNC	<i>CF Network of Canada:</i> <ul style="list-style-type: none"> Hosted 8 discussion groups at CF National Event Eight (8) Representation committee meetings Eight (8) board meetings

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<ul style="list-style-type: none"> MP Meetings 		<p><i>Rural Partners:</i></p> <ul style="list-style-type: none"> Meeting with CENRED staff My Mainstreet Advisory committee meetings (2) CFNC proposal to Innovation Canada for small business outreach webinars <p><i>MP Liaison/Meetings:</i></p> <ul style="list-style-type: none"> Minister Tassi & Shadow Minister Rood on CFNC “ask” Minister Tassi call re FDO increase for CFP CFNC letters re budget submission to RDA Ministers & Shadow Cabinet MP Drouin with East CFs Minister Hajdu policy staff
<p>E-2: Undertake meetings with Senior Directors of Regional Development Agencies & Provincial Ministries</p>		
<ul style="list-style-type: none"> Understand Government Priorities and Cycles to schedule meetings 	<p>CFO RN</p>	<ul style="list-style-type: none"> Meeting (3) with Deputy Minister Gardiner and East/West networks including one with Vice President Linda Cousineau, Director General Paulette Prentice
<p>E-3: Prepare an information package for CFDCs with statistics on rural and urban economies</p>		
<ul style="list-style-type: none"> Identify targets for information packages 	<p>CFO</p>	<ul style="list-style-type: none"> 2021-2022 CFP stats summaries using performance numbers from FedDev & FedNor Stories for CFNC annual report Analysis of CFP increase for Southern CFs Post-RRRF survey re repayments
<p>E-4: Develop a strategy & implementation plan that encourages a continuous process of engagement with MPs/MPPs</p>		
<ul style="list-style-type: none"> Strategy development with GR Committee Develop toolkits for CFDCs as required 	<p>CFO</p>	<ul style="list-style-type: none"> Prepared RFP for advocacy consultants to work with CFNC Eighteen (18) meetings with CFNC reps & Summa Strategies CFNC GR webinar and toolkit – key messages & 2021-2022 national lending stats Assist in preparation of briefing notes for CFNC President’s meetings in Ottawa MP Toolkit with budget submission to Ontario CFs MP Toolkit with May 2nd invite
<p>E-5: Report on impacts of MP/MPP Meetings – Ontario and Canada-wide</p>		
<ul style="list-style-type: none"> CFDCs return MP/MPP meeting summaries to CFO CFO compile & report trends to CFDCs/GR to adjust strategies 	<p>CFDCs CFO</p>	<ul style="list-style-type: none"> Summary report on # of MPs at CFNE circulated to provincial Associations
<p style="text-align: center;">COMMUNITY FUTURES ONTARIO WILL COMMUNICATE THE CFDCS’ ABILITIES AND RESULTS</p>		
<p style="text-align: center;">Strategies to Market the Community Futures Brand</p>		
<p>Objectives for Marketing the Community Futures Brand:</p> <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 	<p>Key Measures:</p> <ul style="list-style-type: none"> ✓ # of new partnerships initiated with CFDCs -1 ✓ # CFDCs using “CF of ____” branding protocol - 2 ✓ 48 vs 3 targeted themes for targeted outreach and/or promotional communications ✓ 50 vs 24 targeted outreach and/or promotional communications ✓ 24 vs 12 success stories/videos published ✓ Four (4) summaries of digital platform metrics <p style="text-align: right;">• # of referrals to CFDCs</p>	

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KEY ACTIONS	BY WHOM	STATUS UPDATE
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	<ul style="list-style-type: none"> Communications staff (East/West/CFO) meetings (44 = once per week) Meeting with ISED “Business Benefits Finder” liaison; update Ontario listing to remove “rural”; track incoming phone calls & referrals
F-2: Inventory marketing examples – “Community Futures of _____”		
<ul style="list-style-type: none"> House sample logo specs & communication material from CFs using new branding 	CFO	<ul style="list-style-type: none"> No samples posted to website
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	<ul style="list-style-type: none"> Compiled national business number statistics of comparison to Non-CFDC assisted clients
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 & SBEC Assoc	<ul style="list-style-type: none"> Liaison with Small Business Ontario board re joint planning for annual Provincial Conference in 2023, not able to partner on CFO conference Meeting with Ontario Nonprofit Network (ONN) on ONCA resources, Community Wealth Building Initiative
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 annual conference attendance ✓ 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 ✓ Open and share rate of digital media tools (benchmark and compare) <ul style="list-style-type: none"> Increase in # of member organizations 	
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 	CFO	<ul style="list-style-type: none"> Annually: 381 twitter total traffic (-45%), 1,537 facebook engagement (-25%); 727 instagram engagement (-24%); 4,934 “Find Your Local CFDC” pageviews (-25%) Quarterly social media and web stats reports
G-2: Continuously evaluate each of CFO’s communication tools		
<ul style="list-style-type: none"> Implement upgrades to CFO website 	CFO	<ul style="list-style-type: none"> Success Story videos (14) added to website
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"> No infographics produced
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 (10) to members