

Community Futures Ontario Activity Report to Stakeholders  
April 1, 2016 – March 31, 2017

OBJECTIVE	BY WHOM	BY WHEN		PERFORMANCE MEASURES	
		Quarter	Priority	PROCESS	PRODUCT
<b>Goal 1 – To deliver timely and relevant products and services which support members in their delivery of the Community Futures Program</b>					
<b>Members Products and Services Strategies</b>					
<i>Develop professional resources to support members in their approaches to Community Strategic Planning, Community Economic Development Projects, Business Advice and Access to Capital in their communities</i>					
<b>A. Promote best practice governance standards</b>					
A-1: Conduct an annual training needs assessment survey for CFDC Boards and Staff	Professional Development Committee (PD)/ Regional Networks (RN)	3 <sup>rd</sup>	Medium	120 people (33% increase) respond to the survey	<ul style="list-style-type: none"> <li>• 90 (0% change) responses received to training needs survey (NE-36; NW-15; E-19; W-20)</li> <li>• Analysis with regional networks used to determine training for 2017/18</li> </ul>
A-2: Enhance professional skills of CFDC management and staff Promote CFDC Staff Certification Program (General Manager, CED Manager, Business Analyst, Administrative Coordinator) Note: 48 of the 225 staff have registered for certification in the last 4 years	Professional Development Committee (PD)/ CFDCs	Ongoing	HIGH	30% (17 more) of CFDC management and staff have registered for certification	<ul style="list-style-type: none"> <li>• 2016/17: 1 GM staff certified</li> <li>• Total since 2012: 22 certified, 26 in progress (5+3 GM; 8+17 BA; 2+2 CED; 8+3 AC)</li> <li>• Total 48 = 21% (48/225) of CF Staff</li> <li>• 2016/2017: 2 graduates of OMEGA lending courses</li> <li>• Total since 2010 – 37 CF staff (16%)</li> </ul>
A-3: Enhance leadership skills of CFDC volunteer board members  Promote Board Development Modules (12 topics)  Note: Total potential market is 658 volunteers within 60 CFDCs)	PD/ CFDCs	Ongoing	High	Quarterly reporting on CFDC Boards taking CFLI training modules with focus on #3 - "Legal Responsibilities of Boards", # 4 - "Financial Mgmt of a CFDC" & "# 13 - Strategic Loan Fund Manual" & Succession Planning for non-profits; 2 new CFLI facilitators are certified	<ul style="list-style-type: none"> <li>• 8 CFLI board training sessions with 159 participants</li> <li>• Modules Delivered: Legal Responsibilities; Strategic Loan Fund Manual (2); Financial Mgmt of a CFDC; Mgmt Recruitment, Performance &amp; Evaluation</li> <li>• 836 participants from 56 (92%) of CFDCs since 2008</li> <li>• 4 CSAE governance webinars for CF Ontario Board</li> <li>• CU Source "Risk Oversight" training with 61 participants</li> <li>• CFDC Succession Planning with 17 participants</li> </ul>

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<b>B. Deliver an annual professional development event with sessions based on best practice standards in the four Community Futures business lines</b>					
B-4: Maximize professional development value of members and stakeholders' attendance at annual conference	CFO/ CFDCs/ FedNor (FN)/ FedDev Ontario (FDO)/ Regional Networks (RN)	1 <sup>st</sup> 2 <sup>nd</sup>	High	3 sessions in each business line; 50% of sessions delivered by CFDC staff using case studies and discussion groups based on best practice standards; > 80% of Ontario CFDCs attend; FDO and FedNor actively involved in planning the event for Kenora; >90% satisfaction rating with event	<ul style="list-style-type: none"> <li>• 2 keynotes &amp; 13 session topics; 40% of topics using CFDC staff</li> <li>• 113 people from 40 CFDC's (67%) + 39 speakers, sponsors, govt attended = 152 + 13 spouses = 165 total</li> <li>• 57% response rate to survey with 95% overall satisfaction rating</li> <li>• Average spending \$994 x 113 delegates = \$112,322 economic impact locally</li> <li>• Net Income \$11,295</li> </ul>
<b>C. Enhance management tools for CFDC activities</b>					
C-5: Community Strategic Planning: Work with members and university researchers (Queens, Waterloo), Northern Policy Institute to identify effective rural regional development models	PD/ CFDCs/ CFO/ RN	1 <sup>st</sup>	Medium	Research papers prepared by universities with participation from several CFDCs; webinars on report results	<ul style="list-style-type: none"> <li>• 2 Innovation award nominations</li> <li>• Award winner from Northeastern Ontario, video and media release posted</li> </ul>
C-6: Community Economic Development Projects: Provide success stories and information on funding sources	CFDCs/ CFO/ RN	Ongoing	High	Monthly success story or funding information featured in newsletter with contact information posted through website & social media	<ul style="list-style-type: none"> <li>• 3 CED award nominations received</li> <li>• Newsletter features: <ul style="list-style-type: none"> <li>• April - Centre for Business &amp; Economic Development</li> <li>• May - The Venture Centre</li> <li>• June - Elgin, Chukuni, Nishnawbe-Aski, Waubetek, Tecumseh &amp; Two Rivers</li> </ul> </li> <li>• Award winner from Southwestern Ontario, video and media release posted</li> <li>• CFP Presentation to UofW LED class</li> <li>• Presentation to Ontario Good Roads Association (OGRA) conference on regional economic development strategies</li> </ul>

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C-7: Business Advice: Facilitate Business Analysts regional sessions and training webinars to address identified needs	PD/ CFDCs/ CFO/ RN	1 <sup>st</sup> 2 <sup>nd</sup>	Medium	Facilitate delivery of 4 training/webinar sessions Business Analysts (BA) design 3 sessions at annual Conference; Monthly SME success story posted through social media; Strengthen the Best Practices section of OA website	<ul style="list-style-type: none"> <li>• “Effective Strategic Planning” webinar with 52 people in attendance</li> <li>• Collaboration project between BDC and CPA Canada that delivered 22 free financial literacy training sessions</li> <li>• Webinar sessions on supporting Social Enterprises (Measuring Impact - 49; Loan Security - 41, Financial Statement Assessment - 43) = 133</li> <li>• Succession Matching training for 24 Northern CFDCs</li> </ul>
C-8: Access to Capital: Share investment portfolio results measurement & reporting & tools for investment fund strategies	CFDCs/ CFO/ RN FN/FDO	Ongoing	Medium		<ul style="list-style-type: none"> <li>• 3 entrepreneur award nominations received</li> <li>• Award winner from Eastern Ontario, video and media release posted</li> <li>• Published Ontario lending stats</li> <li>• CuSource “Governing Credit Risk” training session for 32 Northern staff</li> </ul>
C-9: CF Program Reporting: Maintain FDO/FN web-based forms for CFDCs	CFO/ FN/FDO	Ongoing	Medium		Provide FN/FDO access to CFO website
<b>D. Deliver other government programs that benefit/complement CFDC services</b>					
D-10: Report annually on ongoing results of Sand Plains Community Development Fund (SPCDF) Access to Capital loans	CFO	Ongoing	Low	Quarterly report of access to capital outcomes; posting of SME success stories through website & social media	<ul style="list-style-type: none"> <li>• Year 8 results: 8 new loans \$1,211,765; 12.36% net growth of portfolio; \$3,815,247 available</li> <li>• Follow-up with Community Transition Program (CTP) grant recipients from 2009</li> </ul>
<i>Offer products and services that encourage operational efficiency</i>					
<b>E. Review and evaluate current group services offered to members</b>					
E-11: Maintain group services based on member satisfaction and tender group services when appropriate	CFO/ Benefits Advisory (BA)	2 <sup>nd</sup> 3 <sup>rd</sup>	Medium	Maintain group service quality standards; Annual webinars by service providers	<ul style="list-style-type: none"> <li>• Health plan renewal negotiated with a 13.1% increase in rates effective January 1;</li> <li>• Legal opinion to all Managers and Board Chairs confirming authority to make changes to health plan</li> </ul>

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					<ul style="list-style-type: none"> <li>Investigations on Cyber Security Insurance and Client Life Insurance</li> <li>Negotiated bulk purchase of routers 15 N, 4 S CFDCs</li> </ul>
<b>F. Establish and maintain an annual compensation analysis</b>					
F-12: Communicate results of annual on-line salary survey	CFO/ BA	3 <sup>rd</sup>	Medium	Effective compensation comparison amongst CFDCs; >80% participation rate	<ul style="list-style-type: none"> <li>Survey results published with 82% participation</li> </ul>
<b>G. Investigate other desired member services</b>					
G-13: Develop HR Policy manual with templates for employment contracts and performance reviews	CFO/ BA	1 <sup>st</sup>	Medium	30% participation by CFDCs	<ul style="list-style-type: none"> <li>8 recorded webinars (4 English/4 French) on Financial Management Policies</li> <li>2 recorded webinars on the Employment Policies with 52 attendees</li> </ul>
<b>H. Facilitate increased operating efficiency for members</b>					
H-14: Develop best practices in operations management using common software and technology platforms	CFO/ CFDCs/ RN	Ongoing	High	Support Provincial and regional MIS Committees; Manage IM-IT supplier relationships as appropriate	<ul style="list-style-type: none"> <li>Amended Software Access &amp; Managed IT agreements with CFDCs</li> <li>2 recorded webinars on Cyber Security with 48 attended</li> </ul>
<b>I. Research legislative issues that impact CFDC operations -&gt; CHANGED TO CFDC FINANCIAL MANAGEMENT AND EMPLOYEE POLICIES</b>					
I-15: Monitor Federal & Provincial Legislation changes for issues that impact CFDCs (Employment Insurance)	CFO/ RN	1 <sup>st</sup>	Medium	Webinars on CFDC requirements; health plan provider recommendation	<ul style="list-style-type: none"> <li>Reduction of employment insurance waiting period for EI sickness benefits</li> </ul>
<b>Goal 2: To nurture relationships on behalf of our members, with government, partners and stakeholders that impact rural communities</b>					
<b>Advocacy and Government Relations Strategies</b>					
<i>Provide a consistent message to stakeholders to recognize members as leaders in rural development</i>					
<b>J. Build alliances with government officials</b>					
J-16: Facilitate input to policy discussions on CF Program issues through a Government Relations Committee with Regional Network Representatives	CFO/ CFDCs/ RN Government Relations Committee	Ongoing	High	Consult with RNs on issues; Develop policy position; Implement common messaging	<ul style="list-style-type: none"> <li>Facilitated session with regional networks leading to objectives for "Positioning for future growth of CFP", "A role in gov'ts new program development", "Continuous improvement"</li> </ul>

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	(GR) FN/FDO				<ul style="list-style-type: none"> <li>Summarized examples of other programs delivered by CFDCs</li> </ul>
J-17: Provide CFDCs and Regional Networks with tools to communicate a common message to government officials (collaboration opportunities)	CFO/ CFDCs/ RN GR FN/FDO	1 <sup>st</sup> 2 <sup>nd</sup>	Medium	Develop CFP "quick facts" document of successes	<ul style="list-style-type: none"> <li>Environmental scan report of provincial association communications activities completed</li> </ul>
J-18: Communicate annually with key federal Ministers and critics (Innovation, Science & Economic Development (ISED)/Small Business & Tourism/Science/Finance)	CFO/ RN GR	1 <sup>st</sup>	High	CFDC activities are consistent with government priorities	<ul style="list-style-type: none"> <li>Video message from Minister Bains for conference</li> <li>MP Robert Nault attended at conference &amp; given copies of awards videos to present to Minister Bains</li> </ul>
J-19: Develop strategic alliances with partners on common issues where CFDC priorities are strengthened (CF Network of Canada, Rural Ontario Institute, CCED Network, Ont CED Network, EDCO, Prosper Canada)	CFO/ Partners	Ongoing	Medium	Regular communication with potential partners	<ul style="list-style-type: none"> <li>Rural Employment Initiative project partners with the Newcomer Center of Peel; earned \$10,000 project income</li> <li>Participated in "What is the future of CED in Canada?" discussions</li> <li>CFP social enterprise engagement briefing note prepared for ISED senior policy advisors</li> <li>Advisor to \$5.8 m social enterprise ecosystem (S4ES) project with CCEDNet</li> <li>CFNC strategic positioning document shared with CFDCs including regional consultations in Ontario</li> <li>CFP medical marijuana examples prepared for ISED/Health Canada senior policy advisors</li> </ul>
<b>K. Support the CFDC network delivery of Ontario Government Programs</b>					
K-20: Awareness of capacity for CFDCs to deliver Provincial programs	CFO/ RN	2 <sup>nd</sup>	High	Provincial programs delivered in rural communities by CFDCs	<ul style="list-style-type: none"> <li>Meeting with MEDEI/MRI/MCIIT on domestic marketing campaign for SMEs to scale up export revenues</li> <li>Prequalified CFDC investment funds as eligible to match social enterprise development fund (SEDF) applications</li> </ul>

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					<ul style="list-style-type: none"> <li>• Consultation on MEDG regional business support programs</li> </ul>
<b>L. Develop models for CFDC delivery of programs from various sources</b>					
L-21: Make presentations to provincial ministries and federal departments to promote CFDCs as viable delivery agents for communities facing economic transition (AAFC, OMAFRA, MTCU, MEDEI, ESDC, etc.)	CFO/ RN GR	2 <sup>nd</sup>	Medium	All levels of government are aware of the capacity of CFDCs as preferred partners for rural economic development initiatives	<ul style="list-style-type: none"> <li>• Consulted on strategy letter to Minister Duclos &amp; Mihychuk re development of a social innovation and social finance agenda for Canada</li> <li>• Application to join ESDC Social Innovation Panel</li> </ul>
<b>M. Actively assist CFDCs in developing external partnerships</b>					
M-22: Facilitate discussions for regional or local delivery of NODP/SODP initiatives	CFO/ FedNor/FDO RN	Ongoing	Medium	CFDCs participate in NODP/SODP	<ul style="list-style-type: none"> <li>• Summarized examples of other programs delivered by CFDCs</li> </ul>
<b>Goal 3: To facilitate effective communication and networking among members and stakeholders</b>					
<b>Communications Strategies</b>					
<i>Implement communication tools to facilitate networking among members and stakeholders</i>					
<b>N. Focus annual meeting discussions on common themes and province wide issues</b>					
N-23: Organize round table discussions for all-member participation to clarify current issues and long-term goals	CFO	2 <sup>nd</sup>	High	Conversation café at Annual General Meeting; Web-based discussion groups/ forums on common issues	<ul style="list-style-type: none"> <li>• New Age of CFP prepared for discussions at AGM &amp; online survey of "What other emerging trends lie ahead for CFP at the local, regional, Provincial and National levels?" &amp; "How does the CFP fit with the opportunities arising from these trends?"</li> <li>• Analysis of trends impacting Associations</li> </ul>
<b>O. Utilize annual professional development event, regional network meetings and other opportunities for two-way communication of activities, issues and Board consultation</b>					
O-24: Ensure CFDCs are familiar with CFO services; survey members to determine how widely reports are distributed	CFO	Ongoing	High	Monthly reports & newsletter; quarterly & annual activity summary; efficient web based resources	<ul style="list-style-type: none"> <li>• Monthly update reports to CFDCs and monthly bilingual newsletters to 620 confirmed readers</li> </ul>

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O-25: Undertake quarterly meetings of CFO and Regional Network Chairpeople (Webex video conference to CFO face to face Board meetings)	RN/ CFO	Each Quarter	High	100% participation in quarterly meetings	<ul style="list-style-type: none"> <li>Attendance at – regional network meetings (2-NE, 7- W, 10 – E, 1- NW/NE)</li> </ul>
O-26: Collaborate with Regional Networks to raise awareness and enhance visibility of CFDC services	RN CFO/ FN/FDO	Ongoing	High	Establish protocols for common naming convention – “Community Futures of ....”	<ul style="list-style-type: none"> <li>New Community Futures Ontario bilingual logo launched;</li> <li>Converted website and emails to cfontario.ca</li> </ul>
<b>P. Facilitate regular CFO Board member contact with CFDCs in their region</b>					
P-27: CFO Board members undertake personal contact with each CFDC in their region (2/yr) and/or act as a resource to Regional Networks	CFO	Ongoing	High	Phone calls & emails with each CFDC twice a year to promote common branding and/or attendance at regional network meetings	<ul style="list-style-type: none"> <li>CFO board attendance at 3 CFDC AGMS, and 1 NW, 1 NE/NW, 4 W, 3-E regional meetings</li> </ul>
<b>Q. Research and introduce leading edge communication tools</b>					
Q-28: Coordinate Provincial social media strategy with Regional Networks	CFO/ RN	Ongoing	Low	Integrated Regional & CFO social media strategies (SM Calendar - Client Profiles, Business Tips & News, CFDC Profiles)	<ul style="list-style-type: none"> <li>158 new of 659 twitter followers (+ 25%); total 385 tweets (+ 27%);</li> <li>321 facebook posts; avg weekly page reach range 469 to 568*<sup>1</sup>; avg weekly engaged users range 32 to 53 *<sup>2</sup></li> <li>29,716 website visits (- 17%), by 20,760 unique visitors (- 18%) with 122,416 page views (- 17%)</li> <li>You tube awards videos 3,793 views to date (+ 94%)</li> </ul>

**AVG WEEKLY PAGE REACH \*<sup>1</sup>** We have changed the collection method for this stat to get a more accurate figure. This number better represents the number of people who have seen any content on our page. We have gone back and adjusted the past month’s statistics which are May 377 and April 496.

**AVG WEEKLY ENGAGED USERS 32 \*<sup>2</sup>** This is a new stat that we will be tracking instead of the Average weekly page engagement as we feel that this stat was being collected incorrectly. This new statistic measures how many people interacted with our FB page which translates into likes, comments and shares of our posts.

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