

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

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 & volunteers to CFDCs • Increase the number of credentialed CFDC staff professionals 	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 & boards to deliver on their mandates • 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	STATUS UPDATE
A-1: Offer refresher training of common topics	
<ul style="list-style-type: none"> • Use regional loans officer meetings to identify common training needs • CFO to facilitate session delivery throughout the province 	<ul style="list-style-type: none"> • E-leadership training completed with 24 Northern participants & 83 % completion rate, & high level of satisfaction among participants; southern regions now contemplating offering the course • Innovation training with Dr Loutfy delivered to Northeast & Northwest region CFDCs • Sandra McDowell presentation on "<i>The Neuroscience of Leadership</i>" at EconoUs 2019 highly rated by audience
A-2: Investigate other sources of training & different delivery methods	
<ul style="list-style-type: none"> • Review conference session critiques of different delivery methods • CFO meet with training providers (ie CuSource, etc.) to determine offerings • Develop training "paths" for staff positions • Deliver Pan northern board & staff training in Spring 2020 	<ul style="list-style-type: none"> • Conference with CCEDNet - EconoUs 2019 had 5 forms of sessions: Story-telling (15 minutes), skill building workshops (45 minutes), creative process discussion (60 minutes), plenaries (1-hour panel discussion) & peer learning breakouts (facilitated rotations over 2 hours); 50% of topics in each session time related to CFDCs • CFDC Attendees: 164 (83 staff, 46 board, 35 guests) from 44 CFDCs; 40% of total 414 attendees; 2.5 to 3.2 of 5 CFDCs' rating of content/speakers/workshops, 54% felt not a good fit with CCEDNet, 80% of CFDCs gave 3 out of 5 rating for event overall; CF Ontario admin revenue \$20,000
A-3: Undertake professional development needs survey annually for Board & Staff	
<ul style="list-style-type: none"> • Regional networks share a list of the last 2 years of training sessions to integrate into survey • Use Survey Monkey for training needs to staff & board members • Collaborate with RNs on 2019/2020 training sessions 	<ul style="list-style-type: none"> • 223 responses to training needs survey for Board (117 = +99%) & Staff (106 = +18%) • Results discussed with regional networks, cost sharing of \$1,000 incentive
A-4: Produce an annual salary & benefits survey	
<ul style="list-style-type: none"> • Refine annual web-based survey to include: <ul style="list-style-type: none"> • PT positions & hours of work • Breakdowns by hourly rate 	<ul style="list-style-type: none"> • Not enough prior information on part-time positions to do analysis • Salary & benefits results posted with 48 CFDCs of 58 (83%) participating

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

<ul style="list-style-type: none"> Any non-financial incentives (flex work time, work from home, etc.) Analysis of changes in PT & FT positions over the last 5 years with synopsis of the trends, interpretation/narrative of the findings in packaging of the information 	
A-5: Investigate a Management Mentoring Program marketed to Boards & Staff	
<ul style="list-style-type: none"> Assess the needs across Ontario Investigate BC CF Association Peer Review Committee Look for Not-for-Profit Mentor Programs/Leadership Groups Formalize a Mentoring Program 	<ul style="list-style-type: none"> Changed focus to providing new website section of curated resources for CFDCs to use to support their clients for COVID-19 counselling Provided CFDCs with updated Pandemic Planning template
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 Guide CFDCs in how to use the online tools 	<ul style="list-style-type: none"> Postponed until next fiscal
A-7: Track the impacts of the professional development/training	
<ul style="list-style-type: none"> Develop process to track impacts & not just outcomes (staff progress through various positions in a CFDC based on accomplishment of competencies) Market the value of CFLI staff certification 	<ul style="list-style-type: none"> Trenval staff are first CFDC where all staff have achieved CFLI certification Three recent internal General Manager appointments have been with staff who had attained Business Analyst certification (Trenval, Parry Sound, Chatham)
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: 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	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 	<ul style="list-style-type: none"> Speaking notes for Northern Ontario Board members at Regional Meetings which include: <i>How their region was involved in CF Ontario planning; A reminder on the benefits of membership; & What CF Ontario is doing specifically with their region & for their CFs individually</i> Shared West region's WORC pool best practices for addressing access to capital for DELIA project in East region Attended Northeast, Northwest, Pan Northern Managers & West region F2F meetings; introduced opportunity of Pan Regional network meetings for 2020 & Ontario showcase opportunity at 2021 CF National Event (CFNE)

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

	<ul style="list-style-type: none"> • Attended monthly East & West network meetings; special FN/FDO meetings with CFDCs on COVID-19 response
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 • Use results as part of membership renewal 	<ul style="list-style-type: none"> • Postponed until next fiscal
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 	<ul style="list-style-type: none"> • Summary of CP Ontario affinity plans in membership renewal • WSIB rates survey – two rate categories dependent on CFDC service delivery • Survey on varying usage of Equifax services
B-4: Close the loop on information with immediate & resultant impacts tracking	
<ul style="list-style-type: none"> • Report in CFO monthly update on progress 	<ul style="list-style-type: none"> • RRSP plan changes to Investment Management Fee & Investment Options reported in May/June Updates • Implementation of 1Password software to reduce Cybersecurity risk reported in June Update • Health benefits plan renewal with 4.5% increase for 2020 compared to 2019's 4.1% decrease, leaves rates equal to 2018 • Cybersecurity audits of 21 northern CFDCs • Valeyo loan client insurance acknowledgement of deferred loan payments & continued processing of monthly premium remittances during COVID-19 • Legal opinion to determine CFDCs as Essential Services
B-5: Produce video messages about group purchasing plans	
<ul style="list-style-type: none"> • Work with suppliers to develop videos describing their offerings & post to CFO website 	<ul style="list-style-type: none"> • Health Plan Fraud webinar recorded with supplier & posted to website • Quarterly health plan analysis indicates favorable but fluctuating loss ratio • 2 more Southern Ontario CFDCs accessing Fern Software through CF Ontario licensing agreement (10 S, 22 N) • Bulletproof webinar on BP365 increased cybersecurity offering • 1Password user webinar

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

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 • # of briefings to stakeholders • # of case studies presented
KEY ACTIONS	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) 	<ul style="list-style-type: none"> • Monthly updates to regions on Social Innovation/Social Finance opportunities – Investment Readiness Program (IRP) delivery partnership with Community Foundations of Canada (CFC) • Goal is to ensure CF business counselling services can be purchased by Social Purpose Organizations (SPO) using IRP grants & interested CFDCs can work with local Community Foundations in assessment of SPO applications
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 	<ul style="list-style-type: none"> • FN/FDO reports on Growth & Prosperity Strategies; Canadian Experiences Fund; Regional Economic Growth Fund for Innovation (REGI) • FN policy on loan limits & flexibility of loan interest rates • FDO policy on CFP non-financial requests integrated into new Contribution Agreements • In partnership with CFNC, prepared COVID-19 response recommendations to Minister Joly: \$241 M request for working capital loan funds; Request for designation as eligible financial institutions for delivery of the emergency business account funding
C-3: Facilitate partnership ideas for groups of CFDCs	
<ul style="list-style-type: none"> • Request case studies from another province's CFDCs 	<ul style="list-style-type: none"> • Facilitated Inclusive Growth Fund application with Western CFDCs & Pillar Non-Profit to FDO - deferred to next fiscal
C-4: Solicit case studies from CFDCs delivering other programs	
<ul style="list-style-type: none"> • Request case studies from CFDCs • Presentation at annual conference 	<ul style="list-style-type: none"> • Annual Award nominations 3 Innovation & 6 CED Projects received • Annual conference partnership with CCEDNet provides connections to other agency's projects through workshops sessions & tours (ie sustainable food tourism) • Videos of CED award "<i>Saugeen Connects</i>"; Innovation award "<i>Northeast Superior Regional Broadband Network</i>"; Entrepreneur award "<i>Fromagerie Kapuskoise</i>"

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

	<ul style="list-style-type: none"> • Presentations at EconoUs 2019 by PELA CFDC: "<i>Social finance in rural economic development</i>"; CDC of SSM: "<i>Social enterprise & its role in developing our communities</i>"; Cornwall CFDC: "<i>Cross border partnership program</i>" • EconoUs panel discussions with Northumberland CFDC: "<i>Strategies for resourcing innovation</i>"; Haliburton CFDC: "<i>21st Century Leadership</i>"
C-5: Share information on Regional Network activities	
<ul style="list-style-type: none"> • Bi-Annual face to face meeting with CF Ontario Board 	<ul style="list-style-type: none"> • Joint meeting to discuss: regions' current activities; results of training survey; opportunities for collaboration; government relations strategies; public relations strategies & other issues or opportunities • Orientation with new NW & NE regional coordinators
C-6: Brief stakeholders on CFDC delivery capacity	
<ul style="list-style-type: none"> • Gather statistics from CFDCs on third party delivery including value of contract & outcomes • Develop briefing note to share across government Departments & Ministries 	<ul style="list-style-type: none"> • CFDC loan, CED Project & Women Entrepreneur Stats summarized for 2018-2019 • S& Plains access to capital project outcomes updated on website; investment fund final report underway
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 & board involved in CFO Committees • # of responses to surveys • # of personalized phone calls with CFDCs • # of Facebook likes for video message • # pf re-tweets of CFO messages
KEY ACTIONS	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 	<ul style="list-style-type: none"> • CF Program orientation webinar (CFP 101) delivered to CF Peterborough Board with recording to be posted to CFO website & used with new CF Ontario board members plus one on one website orientation
D-2: Facilitate member forums at CFO AGM	
<ul style="list-style-type: none"> • Use Event Mobi app • Use Audience Response Apps 	<ul style="list-style-type: none"> • AGM Member Forum replaced with guest speaker • EconoUs 2019 sessions – Harvesting questions: <i>Why should communities lead innovation; What are your questions</i>; closing plenary: <i>Design thinking for communities leading innovation</i>
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 	<ul style="list-style-type: none"> • Impact survey to track CFDC immediate response to COVID-19: >1,000 loans adjusted by 40% of CFDCs within the 1st week; many offer specialized loans

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

D-4: Prioritize emails as Important/Response Required & Reminder	
<ul style="list-style-type: none"> Post monthly updates to website for CFDCs to reference 	<ul style="list-style-type: none"> Monthly updates posted to CFO website Quarterly stakeholder reports posted to CFO website Special COVID-19 update template for priority news
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 # of board members engaged in promoting Community Futures Program
KEY ACTIONS	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 	<ul style="list-style-type: none"> Participation in CFNC annual report with "Head Start in Business" CED success story; 2018-19 loan & CED statistics; Minister Jordan's Rural Economic Development consultation with Valley Heartland CFDC Promotion of Rural Ontario Institute <i>Stories of Rural Entrepreneurship Programming</i> featuring several CFDCs Participation in University of Guelph Rural Economic Development comparative study with Irish LEADER program Cdn Social Enterprise conference presentation on CF capital for social finance Presentation to Univ of Waterloo Masters course – Economic Development Theory & Practice Facilitating CF engagement in Univ of Waterloo – L3 research study on SPO conversion as a business succession tool
E-2: Undertake meetings with Senior Directors of Regional Development Agencies & Provincial Ministries	
<ul style="list-style-type: none"> Understand Government Priorities & Cycles to schedule meetings 	<ul style="list-style-type: none"> CFO President at FedDev consultation in Eastern Ontario West region CFDC recommendations to MEDTJC for changes to regional development program in southwest Briefing with ESDC social finance policy unit on CF Assocs as wholesaler of capital DG Cousineau attendance at CF Ontario awards Discussion with ESDC social finance policy unit on rural social enterprise gap analysis research
E-3: Prepare an information package for CFDCs with statistics on rural & urban economies	
<ul style="list-style-type: none"> Identify targets for information packages 	<ul style="list-style-type: none"> Circulated link to national horizontal evaluation of the CFP evaluation report

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

	<ul style="list-style-type: none"> Professional info-graphics of national, provincial & regional statistics
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 	<ul style="list-style-type: none"> MP toolkit (bilingual) including: meeting invitation letter; CFNC ministerial brief – <i>Why refinance the CFP?</i>; fact sheet 2019; MP key messages; infographics charts; feedback form for MP meeting outcomes Contributed to CFNC federal budget consultation briefing Meeting with Parliamentary Secretary Kate Young CFNC recommendations to Minister Joly shared with Parliamentary Secretaries Kate Young & Terry Sheehan
E-5: Report on impacts of MP/MPP Meetings – Ontario & 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 	<ul style="list-style-type: none"> More than 20 CFDCs met with local MPs using toolkit & budget brief Monthly update to members on CFNC meetings with Ministers & MPs
COMMUNITY FUTURES ONTARIO WILL COMMUNICATE THE CFDCS' ABILITIES & 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 # of success stories/videos published Increase website statistics
KEY ACTIONS	STATUS UPDATE
F-1: Investigate the cost & opportunity of undertaking "public" marketing	
<ul style="list-style-type: none"> Using a coordinated effort, identify & then target participation based on key events/opportunities, both global (all CFDCs) opportunities, & also regional specific drivers/local economies (Marketing SWOT by CFO & by Reg CFs) 	<ul style="list-style-type: none"> Worked with West Region to develop one-minute business clips & success videos Initiated regular regional communications staff meetings to discuss opportunities to collaborate on marketing activities
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 & MPs 	<ul style="list-style-type: none"> Sharing of Canva account for social media templates
F-3: Inventory marketing examples – "Community Futures of _____"	
<ul style="list-style-type: none"> Request sample logo specs & communication material from CFs using new branding House sample materials on CF Ontario website Gather comparative web stats from branded CFDCs 	<ul style="list-style-type: none"> Shared CF branding examples with Chatham-Kent CFDC
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 	<ul style="list-style-type: none"> Included in MP toolkit

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2019 – March 31, 2020

F-5: Approach a social media subcommittee to engage different audiences	
<ul style="list-style-type: none"> • Create global & segmented target audiences for specific medium & messages across a timeline 	<ul style="list-style-type: none"> • Focus on positive news stories of businesses helping out during COVID-19
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 	<ul style="list-style-type: none"> • Referral from CFDC for initial contact with MEDJCT about program re-design of EODF & SODF • BDC attendance & financial support at EconoUs 2019
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 • Increase in annual conference attendance • Open & share rate of digital media tools (benchmark & compare) • Increase in group plan participation • Multiple nominations for CFO Board Representatives
KEY ACTIONS	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 	<ul style="list-style-type: none"> • Daily social media posts & regular website updates • Developed 2021 CF National Event business plan based on comparatives to last 8 events, with projected budgets & partnership opportunities & initiated planning committee meetings
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 	<ul style="list-style-type: none"> • New "Hub & Spoke" website model • New website flyer & demonstration at EconoUs 2019 trade show booth
G-3: Use Infographics targeted at the membership, regional networks, funders, staff, boards	
<ul style="list-style-type: none"> • CFO Quarterly performance stats 	<ul style="list-style-type: none"> • Postponed to next fiscal
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 	<ul style="list-style-type: none"> • Reference to CFP impacts in monthly Update report • Promotion of 2021 National Event as opportunity to showcase Ontario CFDCs
G-5: Produce a brag video for 2012 to 2017 on the # of success stories, social media stats, loyalty/affinity program usage	
<ul style="list-style-type: none"> • Link to Gov Priorities • Consistent professional format 	<ul style="list-style-type: none"> • Postponed to next fiscal

C:\OACFDC Offline Files\Operations items\CF Ontario Report to Stakeholders-2019-2020 Final.docx