

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2023 – March 31, 2024

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 ✓ One (1) professional development event facilitated <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"> • 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 	Regional Networks	<ul style="list-style-type: none"> • Promoted 18 Webinars/Training opportunities for CF Staff or Board Members
A-2: Investigate other sources of training and different delivery methods		
<ul style="list-style-type: none"> • Review conference session critiques of different delivery methods and topics of interest • Solicit session offerings from internal and external sources • Deliver Annual professional development conference in collaboration with Regional Networks and FD/FN 	2023 CFO Conference Planning Committee 2024 CFO Conference Planning Committee	<i>Conference 2023 April 30 to May 2, 2023:</i> <ul style="list-style-type: none"> • Secured \$62,800 from 12 sponsors • Registrations - 161 + 48 guests = 209 + 6 MPs = 215 • 26 sessions - workshops (18)/discussion groups (4)/tours (4) • Net loss - \$3,500 due to unforeseen hotel attrition expense <i>Conference 2024 – June 2 to 4, 2024:</i> <ul style="list-style-type: none"> • Hotel, registration, keynotes, sessions, budget, secured \$63,200 in partner contributions
A-3: Liaise with Regional Networks for annual professional development needs of Board and Staff		
<ul style="list-style-type: none"> • Collaborate with RNs on 2023-2026 training sessions 	PD/CFDCs	<ul style="list-style-type: none"> • Investigated Mash Up Lab regional training to identify potential CF clients • Investigated AFIA Diversity, Equity, Inclusion (DEI) certification training and Business Advisor Certificate program from GrowthWheel
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"> • Produced CF Ontario salary survey report and comparative tools for local wage analysis
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 	CPC CFDCs CFLI	<ul style="list-style-type: none"> • 2 CFLI courses offered at conference with 13 attendees • CuSource courses in financial analysis for 7 students

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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 ✓ Manulife Structured Retirement Savings Plan ✓ National D&O/E&O/Professional Liability Insurance Plan
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 	RN	<i>Discussions:</i> <ul style="list-style-type: none"> • Improvements for annual conference • Enhancements to annual salary survey
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"> • Initiated marketing of health benefits plan to other suppliers
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"> • CFO staff evaluating Homewood Health inc. employee assistance plan (EAP) • Conversion to Fern Software - 1 CFDC (Total 42 CFs) • Based on Northern CFs' MSOffice 365 usage, promoted NFP pricing advantage
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	<i>Status Reports:</i> <ul style="list-style-type: none"> • Conference 2023 results • RRRF repayments survey • CFO Strategic Planning process • Work from home policies for CFO
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	<ul style="list-style-type: none"> • Webinars by 6 service providers with posting to CFO website

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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 briefings to stakeholders - 6 ✓ # of case studies presented - 9 ✓ 19 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 # of partnership opportunities identified
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 discussions with East & West Networks on opportunities for collaboration Liaison with Digital Main Street for cross promotion of services Facilitated workshop on roles & responsibilities with regional network representatives
C-2: Engage FN/FDO on emerging opportunities		
<ul style="list-style-type: none"> Participate in CFP Modernization discussions with FDO/FN Investigate digital transformation of information technology infrastructure and performance reporting 	CFO FDO/FN	<ul style="list-style-type: none"> Performance Reporting Portal to facilitate data collection underway Managed IT contract with FedNor for 2023-2024; Proposal for 2024-2025 with increased cybersecurity processes
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"> Meetings re capital shortage in 3 CFs Briefing note to FDO and follow up
C-4: Solicit case studies from CFDCs implementing operating efficiencies		
<ul style="list-style-type: none"> Request best practice case studies from CFDCs for presentations at regional and provincial conference(s) 	CFO CFDCs	<ul style="list-style-type: none"> Conference workshops include 9 sessions on CFDC best practices
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"> Reg Network quarterly meeting with CFO board Nineteen (19) Regional Network Meetings (8-West/2-Northeast/8-East/ 1-Northwest)
C-6: Brief stakeholders on CFDC delivery capacity		
<ul style="list-style-type: none"> Develop briefing materials to share across government Departments and Ministries 	CFO CFDCs GR Committee	<ul style="list-style-type: none"> Meetings with Ministers Tassi & Hajdu at CFO conference Minister Hutchings attendance at CFO conference Meetings with MP Eric Melillo (FedNor critic), MP Arpan Khanna (Oxford County), FedDev Minister Tassi Briefing note on CF support to housing projects for Minister Tassi and Nancy Gardiner Contact with Minister Tassi and MP Rood at International Women's Day event

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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 responses to surveys ✓ # of different staff and board involved in CFO Committees <ul style="list-style-type: none"> • # 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 (12) distributed to each CFDC • 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 	CFO CFDCs	<ul style="list-style-type: none"> • Virtual AGM with 46 voting members in attendance, introduction of strategic planning environmental scan process by Intersol • Online environmental scan for CFs and regional networks • CFO Board and Regional Network strategic planning sessions facilitated by Intersol group
D-3: Prioritize emails as Important/Response Required and Reminder		
<ul style="list-style-type: none"> • Post monthly updates to website for CFDCs reference 	ED	<ul style="list-style-type: none"> • Newsletter posted monthly (8) • Conference newsletters published weekly (3)
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"> ✓ # of information inquiries from government - 1 ✓ # of meetings with politicians - 5 ✓ # of board members engaged in promoting the Community Futures Program - 6 <ul style="list-style-type: none"> • Increases or changes in CFDC operating funding
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 • Participate in Fed Govt Rural Committee work, Programs, Initiatives, etc. 	RN CFO CFNC	CF Network of Canada: <ul style="list-style-type: none"> • Strategic planning for 2023-2024 • Ten (10) Board Meetings • Two (1) Representation Committee meeting • Letters to RDA ministers re national ask CFP Modernization Discussions: <ul style="list-style-type: none"> • Host meeting of Northern & Southern CF reps • Host meeting of Southern CF reps Other Organizations: <ul style="list-style-type: none"> • BDC re conference opportunities • Canadian Urban Institute re shared advocacy opportunities

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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"> Meetings (2) with President Nancy Gardiner & Valerie Gideon at CFO conference Meeting with FedNor - Lucie Perreault, Nick Fabiano & FedDev - Jeff King, Sophie Rubimbwa re enhanced Managed IT services Meeting with FedNor (Lucie) and FedDev (Paulette) re CFNC pre-budget submission FDO meeting with CFs re new intake, communications, CEBA changes Meeting with RDA presidents re CFP federal budget request FDO meeting re RRRF changes Meeting with FedNor – Lucie Perreault, Fran Nadon re CFO funding issues Meeting with FedDev - Linda Cousineau, Kayla Monteiro re opportunities for FDO president to meet with CFs; two follow up meetings with Linda Cousineau
E-3: Liaise with government departments and organizations providing statistics on rural and urban economies for CFDCs		
<ul style="list-style-type: none"> Promote access to community databases on rural demographics (ISED, OMAFRA, Environics) 	CPC RN	<ul style="list-style-type: none"> CFDC Access to Innovation Canada information videos – client facing & train the trainer Presentation to University of Waterloo Local Economic Development students about CFP CF access to University of Guelph research on innovative rural workforce strategies
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 Meet with RDA Ministers and Shadow Ministers 	Govt Relations Committee	<ul style="list-style-type: none"> Twenty (20) meetings with CFNC reps & Summa Strategies GR committee meeting to review CFNC pre-budget submission & Northern Ontario strategy proposal
E-5: Report on impacts of MP/MPP Meetings – Ontario and Canada-wide		
<ul style="list-style-type: none"> CFO compile MP/MPP meeting summaries & report trends to CFDCs/GR to adjust strategies 	CFDCs CFO GR	<ul style="list-style-type: none"> Report to members on CFNC Ottawa meetings with MPs, Ministers and RDA Presidents CF MP meeting reports to Summa Strategies
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 referrals to CFDCs >3,000 ✓ # of CFDCs using "CF of ___" branding protocol +1 for total of 10 ✓ ___ vs 3 targeted themes for targeted outreach and/or promotional communications ✓ ___ vs 24 targeted outreach and/or promotional communications ✓ ___ vs 12 success stories/videos published ✓ Four (4) summaries of digital platform metrics
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 CFNC	<ul style="list-style-type: none"> Weekly communications staff (East/West/CFO/NE) meetings Discussion of common communications impact measures (social media, newsletters, website) with 4 submissions rec'd for marketing campaign research CFNC discussion of national tagline for CFP Submission of Ontario success stories for CFNC annual report

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F-2: Inventory marketing examples – “Community Futures of _____”		
<ul style="list-style-type: none"> House sample logo specs and 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 StatsCan reports for CFNC pre-budget submission Compiled national CFP results for CFNC annual report Created infographic of provincial CFP results (north, south, all Ontario) for MP toolkit
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"> BDC senior staff at CFO conference Contact with Alterna Savings for cross promotion referrals to GTA
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"> ✓ Open and share rate of digital media tools (benchmark and compare) ✓ Increase in group plan participation ✓ Four (4) quarterly reports showcased on CF Ontario website for member CFs ✓ One (1) market research or stakeholder/demographic survey <ul style="list-style-type: none"> Multiple nominations for CFO Board Representatives <ul style="list-style-type: none"> Increase in # of member organizations Increase in annual conference attendance
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"> Annual: Facebook engagement .87% (-33%); Instagram engagement 825 (+100%); LinkedIn engagement 3.97% (+54%); Twitter engagement rate 3.178 (+100%); Annual: YouTube views 1,819 (+8%); Website 22,632 new users, 5,064 returning users; Business Benefits Finder 4,427 views; 1,144 referrals – see newly revised digital media report for Apr 2023 – Mar 2024
Website:		
<ul style="list-style-type: none"> Implement upgrades to CFO website 	CFO	<ul style="list-style-type: none"> Separate Awards section added to website Changes to members’ only website rebuild underway
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 (12) to members