

COMMUNITY FUTURES ONTARIO Activity Report to Stakeholders
April 1, 2017 – March 31, 2018

OBJECTIVE	BY WHOM	BY WHEN		PERFORMANCE MEASURES	
		Quarter	Priority	PROCESS	PRODUCT
Goal 1 – To deliver timely and relevant products and services which support members in their delivery of the Community Futures Program					
Members Products and Services Strategies					
<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>					
A. Promote best practice governance standards					
A-1: Conduct an annual training needs assessment survey for CFDC Boards and Staff	Professional Development Committee (PD)/ Regional Networks (RN)	3 rd	Medium	90 people respond to the survey based on Trends identified in New Age for CFP	<ul style="list-style-type: none"> • 119 (32% increase) responses to training needs survey (NE-36; NW-17; E-42; W-24) • Analysis with PD Committee and Regional Networks to review plans for 2018-19
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 3 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"> • 2017/18: 2 GM, 1 BA & 1 AC certified • 7 new (1 GM, 4 BA & 2 AC) • Total since 2012: 29 certified, 31 in progress (7+3 GM; 10+22 BA; 2+2 CED; 9+4 AC) • Total 52 = 23% of CF Staff • 2017/2018: 2 graduates of two CuSource Lending Courses • Total OMEGA & CuSource grads since 2010 = 39 CF Staff (17%)
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	Promote new Board certification streams in Leadership, Corporate Leadership, Financial & Lending Leadership; Quarterly reporting on CFDC Boards taking CFLI training modules with focus on "#3 - Legal Responsibilities of Boards", & "#13 - Strategic Loan Fund Manual"	<ul style="list-style-type: none"> • 4 CFLI Board training sessions with 74 participants • Modules delivered: Board Leadership; Strategic Loan Fund Manual; Management Recruitment, Performance & Evaluation; So You Want to be a CF Chair–Chairing With Confidence • 910 participants from 56 (92%) of CFDCs since 2008
B. Deliver an annual professional development event with sessions based on best practice standards in the four Community Futures business lines					
1-4: Maximize professional development value of members	CFO/ CFDCs/	1 st 2 nd	High	Session Topics based on training needs and post	<ul style="list-style-type: none"> • 2 keynotes & 17 session topics delivered; 41% of topics using CFDCs

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and stakeholders' attendance at annual conference	FedNor (FN)/ FedDev Ontario (FDO)/ Regional Networks (RN)			conference surveys; 60% of sessions delivered by CFDC staff using case studies & discussion groups; > 75% of Ontario CFDCs attend in London; >90% satisfaction rating with event	<ul style="list-style-type: none"> • 169 people attended from 51 CFDCs (83%); total with suppliers, govt, speakers & guests - 290 attendees • 50% response rate to survey with 93% overall satisfaction rating • Average spending \$656 x 169 delegates = \$110,864 economic impact locally • Net income \$2,950
C. Enhance management tools for CFDC activities					
C-5: Community Strategic Planning: Work with members, University of Guelph Rural Economic Development researchers, Northern Policy Institute to identify effective rural regional development models	PD/ CFDCs/ CFO/ RN	1 st	Medium	Comparative research paper (CFDC and European LEADER) prepared by university with participation from several CFDCs; Webinars on report results	<ul style="list-style-type: none"> • 2 Innovation Award nominations; Winner from Southcentral Ontario, video posted to CFO YouTube & CFNC website • Facilitated projects with Northern Policy Institute, University of Guelph and Sheridan College
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"> • 4 CED Award nominations; Winner from Eastern Ontario, video posted to CFO YouTube & CFNC website • CFP presentation to UofW LED class • EDCO conference workshop featuring 3 successful CF/EcD projects • Tour of Oxford County EcD best practices with UofW LED class
C-7: Business Advice: Facilitate Business Analysts regional sessions and training webinars to address identified needs	PD/ CFDCs/ CFO/ RN	1 st 2 nd	Medium	Facilitate delivery of 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"> • Enrolled CFDCs in Social Enterprise Institute & distributed technical assistance coupons • CuSource Business Financial Statement Analysis course for 20 CF staff
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"> • BDC/CFDC Working Group finalized Letter of Intent for collaboration • 15 Entrepreneur Award nominations; Winner from Eastern Ontario, video posted to CFO YouTube & CFNC website

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C-9: CF Program Reporting: Maintain FDO/FN web-based forms for CFs	CFO/ FN/FDO	Ongoing	Medium	Provide FN/FDO access to CFO website	<ul style="list-style-type: none"> Posted Ontario 5-year CF lending stats to website
D. Deliver other government programs that benefit/complement CFDC services					
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"> Year 8.5 results: 4 new loans \$800,000; 15.16% net growth of portfolio; \$4,666,745 available CF discussions for post March 2019 disposition of funds
<i>Offer products and services that encourage operational efficiency</i>					
E. Review and evaluate current group services offered to members					
E-11: Maintain group services based on member satisfaction and tender group services when appropriate	CFO/ Benefits Advisory (BA)	2 nd 3 rd	Medium	Maintain group service quality standards; Annual webinars by service providers	<ul style="list-style-type: none"> Health plan renewal negotiated with 7.1% increase 3 Health plan webinars on administration, renewal & plan coverage with 56 participants 1 CF left health plan due to budgetary constraints
F. Establish and maintain an annual compensation analysis					
F-12: Communicate results of annual on-line salary survey	CFO/ BA	3 rd	Medium	Effective compensation comparison amongst CFDCs; >80% participation rate	<ul style="list-style-type: none"> Salary results published with 80% participation
G. Investigate other desired member services					
G-13: Solicit preferred supplier recommendations from CFDCs to feature in "Colleagues Corner" of newsletter with web posting and disclaimer in Member Benefits	CFO/ BA	1 st	Medium	3 new suppliers based on CFDC testimonials about the service	<ul style="list-style-type: none"> 26 CFDCs transferred loan client insurance to new supplier Valeyo (>1200 loans) Added Purolator affinity plan
H. Facilitate increased operating efficiency for members					
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"> Secured FedNor funding for northern CFDC MIS support Renewed MIS supplier agreements Published comprehensive MIS Policies & Procedures Manual for CFDCs to adapt locally

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I. Research legislative issues that impact CFDC operations -> CHANGED TO CFDC FINANCIAL MANAGEMENT AND EMPLOYEE POLICIES					
I-15: Monitor Federal & Provincial Legislation changes for issues that impact CFDCs	CFO/ RN	1 st	Medium	Webinars on CFDC requirements	<ul style="list-style-type: none"> • Updated HR Policy template to comply with Bill 148 - Fair Workplace, Better Jobs Act • Summary of possible Federal Budget 2018 impacts on CFDCs
Goal 2: To nurture relationships on behalf of our members, with government, partners and stakeholders that impact rural communities					
Advocacy and Government Relations Strategies					
<i>Provide a consistent message to stakeholders to recognize members as leaders in rural development</i>					
J. Build alliances with government officials					
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 (GR) FN/FDO	Ongoing	High	Monitor progress of new GR Toolkit – “Enhanced CF Program Delivery”	<ul style="list-style-type: none"> • Toolkit used by 57 CFDCs for MP meetings requesting support letters to Minister Bains about increases to CFP funding, only 6 rural MPs not approached • Ontario CFs are 719 (17.5%) of 4,090 CFP petition signatures • CFNC meeting with RDAs re CFP Budget 2018 recommendations
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 st 2 nd	Medium	Monitor promotion of new GR Toolkit – “Enhanced CF Program Delivery”	<ul style="list-style-type: none"> • Provided CFDCs with updated ‘What the CFP Can Do For You’ whiteboard video in English & French
J-18: Communicate annually with key federal Ministers and critics (Innovation, Science & Economic Development (ISED)/Small Business & Tourism/Science/Finance)	CFO/ RN GR	1 st	High	CFDC activities are consistent with government priorities	<ul style="list-style-type: none"> • Trenal BDC presentation to all party Entrepreneurs Caucus in Ottawa • Meetings with MP Ruby Sahota and Marc Serré on rural issues
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"> • CFNC: Strategic positioning document distributed to CFDCs for presentation to local MPs; CFO will host 2021 National Event • Rural Employment Initiative (REI): Diversity webinars; Rural job fair; Oxford County MOU Best Practice;

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					FedNor link to project; \$10,000 income to CF Ontario <ul style="list-style-type: none"> Rural Ont Institute (ROI): Survey of issues for provincial election
K. Support the CFDC network delivery of Ontario Government Programs					
K-20: Awareness of capacity for CFDCs to deliver Provincial programs	CFO/ RN	2 nd	High	Provincial programs delivered in rural communities by CFDCs	<ul style="list-style-type: none"> Facilitated collaborative application (4 CFDCs with S4ES project) to Provincial Social Enterprise Demonstration Fund for \$1.9 M Submitted consortium application to Provincial Entrepreneurship Learning Stream for \$3.9 M
L. Develop models for CFDC delivery of programs from various sources					
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 nd	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"> Led preparation of CFNC briefing note to SI/SF re CFP capacity/ recommendations
M. Actively assist CFDCs in developing external partnerships					
M-22: Facilitate discussions for regional or local delivery of NODP/SODP initiatives	CFO/ FedNor/FDO RN	Ongoing	Medium	CFDCs participate in Innovation Agenda Programs	<ul style="list-style-type: none"> Participated in FedNor consultation on Prosperity & Growth Strategy for Northern Ontario
Goal 3: To facilitate effective communication and networking among members and stakeholders					
Communications Strategies					
<i>Implement communication tools to facilitate networking among members and stakeholders</i>					
N. Focus annual meeting discussions on common themes and province wide issues					
N-23: Organize round table discussions for all-member participation to clarify current issues and long-term goals	CFO	2 nd	High	Conversation café at Annual General Meeting; Web-based discussion groups/ forums on common issues	<ul style="list-style-type: none"> Discussion of “What are the strongest messages you as CFDCs can deliver in support of the CFP – locally, provincially and nationally?”
O. Utilize annual professional development event, regional network meetings and other opportunities for two-way communication of activities, issues and Board consultation					
O-24: Ensure CFDCs are familiar with CFO services; survey members to	CFO	Ongoing	High	Monthly reports & newsletter; quarterly & annual activity	<ul style="list-style-type: none"> Monthly update reports to 61 CFO members & monthly bilingual

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determine how widely reports are distributed				summary; efficient web-based resources	newsletters to 680 readers
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"> • Attendance at Regional Network meetings: 3 - NE, 1 – NW/NE, 6 - W + 7 West Mktg mtgs, 9 – E) • Face to face strategic planning session with regional networks
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 & logo usage – “Community Futures of”	<ul style="list-style-type: none"> • 3 CFDCs using “CF of...” naming convention
P. Facilitate regular CFO Board member contact with CFDCs in their region					
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	Attendance with each RN twice a year to liaise on common issues (training needs, marketing)	<ul style="list-style-type: none"> • CFO board attendance at 3 CFDC AGMs (Huron & Frontenac, Elgin) & regional meetings
Q. Research and introduce leading edge communication tools					
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"> • 123 new of 771 twitter followers (+18%); total 278 tweets (-12%) • 385 facebook posts (+20%), avg weekly page reach range 694 to 1,045; avg weekly engaged users range 32 to 54 • 23,356 website visits (-21%), by 15,971 (-23%) unique visitors with 104,647 (-14%) page views • YouTube awards videos 5,280 views to date (+39%)

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