

**SECTION 1
Board Motion**

Motion from your Board of Directors that approved the 2021-22 Annual Performance Report.

| | |
|-------------------------------|---|
| Date of Board Meeting: | June 20, 2022 |
| Motion: | "To accept the Pacifican 2021-22 Annual Performance Report as presented." |
| Moved By: | |
| Seconded By: | |

**SECTION 2
Executive Summary on Overall Performance for 2021-22**

Please provide a short narrative (half- to one-page) summarizing your organization’s overall performance, successes, challenges and issues for the past fiscal year, including any COVID-19 pandemic impacts. Highlight any governance improvements undertaken (board training, new policies, etc.)

Regional Relief and Recovery Fund

20 additional RRRF loans were made from April 13 to Sep 21 totaling \$476,000.

Total RRRF loans were \$2,176,640 to 56 local businesses. 157 jobs were supported through the RRRF program.

Training – Taking Care of Business

Funding for Taking Care of Business workshops ended March 31, 2022. 146 online workshops were delivered for the 2021/22 fiscal year, to a total of 1,026 local participants.

Community Futures BC – Client Relationships Management

Building on the success of the Taking Care of Business program, we have been contracted by Community Futures BC to lead a project developing a Client Relationships Management / Partnerships web portal for BC Community Futures offices. The initiative is based on the success of the Taking Care of Business platform.

There are currently 11 CF offices participating in the Taking Care of Business Program, with a total of 837 members.

Northern CFs Shared Services

CFNC has been contracted to provide digital marketing services and Microsoft Teams moderation/support to the 9 Northern CFs.

Regional Business Liaison Program

Funding for the Regional Business Liaison program came to an end as of December 14, 2021.

Ellen was able to support businesses with: Grant Assistance, Financing Application Assistance, Bookkeeping Setup, Business and Cashflow Reviews, Business Startup Information.

Northern CFs: ROF Reports

Through CFFFG, Northern CFs contracted three asset mapping / opportunities analysis in the following areas: Digital economy; Light Scale Manufacturing; Arts and Crafts Sector.

A proposal for implementation of activities identified through this work is underway.

Labour Shortage

CF Staff worked with the City of Quesnel Economic Development Office, Work BC and the Quesnel and District Chamber of Commerce to implement initiatives to support recruitment and retention challenges

Paramedic Training

We were asked to be the Community Partner to bring Primary Care Paramedic (PCP) training to Quesnel.

11 students were approved for PCP training, 2 from Quesnel. Training is ongoing

Cariboo Chilcotin Coast Tourism Association – Spark Program

In partnership with the Sun Country and Cariboo-Chilcotin CF offices, we supported CCCTA in the delivery of the Spark program. 5 finalists pitched their ideas to the judges panel on Mar 22 with 3 winners selected.

**SECTION 3
COVID-19 Summary**

Please describe how your organization utilized the funds provided for RRRF administration costs (if applicable). Note: These are the funds provided by the CF Association.

N/A

**SECTION 4
Success Stories**

Please provide three success stories with a short description, the role your organization played and why you feel this is a success for the community. This can include RRRF or pandemic-related success stories. *Note: Please ensure you have approval from the client to include their success story.*

PacifiCan uses these stories to demonstrate the impact of the CFs in the region and to outline concrete examples of positive outcomes for stakeholders.

| Client Name | Service Provided (loan, business services, comm. planning & implementation) | Description should include: <ul style="list-style-type: none"> • Did it align with GOC/PacifiCan Priorities? • What role did the CF play? • Describe how this project/loan/service/initiative made a difference in the client’s organization and/or community? • What were the final outcomes* from the activity? • How has this positively affected the community? • How has this service enhanced the economy in the community? (6-8 sentences) |
|------------------------|---|---|
| R10 First Aid Training | Business advisory and lending | This start-up provides Red Cross training for Northern BC. Community Futures provided business planning services as well as the -up financing. With that she was able to offer these new services in our region. As a female entrepreneur we supported one of the WD equity groups. We created one 1 FT job and leveraged \$15,000.00 through client’s investment. Our community and the northern region benefitted strongly from the start of this business as the mining and logging industry as well as any other industry need to keep up with regular training for their safety regulations. Our client is providing these services in Williams Lake, Quesnel, Prince George and onsite for some of her business clients. <u>Testimonial:</u> The day I got the courage to walk into Community Futures North Cariboo was the start of a big step. I finally shared my grand idea of an all mobile first aid training company with people who could really help. I had been teaching part time for over 6 years for other agencies and through my own Red Cross Training Partnership but only on a word-of-mouth basis which was keeping my idea and my dream pretty small. With an incredible amount of patience and encouragement, I was able to do the foundational work required to really build a successful business. The big hurdles of where to start, what to do first, who to contact, how to get everything moving forward with a well laid out plan was what I needed most. Saggi Stoldt was amazing to work with, she helped me to really see how effective a good business plan and more could help me to take that big step as an entrepreneur. |

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| <p>Sprout Kitchen</p> | <p>Business advisory services</p> | <p>Community Futures supported the local community kitchen with one-on-one support in digital marketing. Enhanced digital marketing skills will improve Sprout Kitchen’s ability to market their services into the local community.</p> <p><u>Testimonial:</u> We are a new non-profit business in Quesnel, and we have a small team of two staff, neither of whom have a marketing background. We signed up for several marketing coaching sessions with Elizabeth at Community Futures to help us develop some professional marketing materials, including brochures and event posters. The experience was great and brainstorming with Elizabeth helped us to come up with some really good marketing materials. Through the sessions we were also able to gain new skills using the program Canva, which has been really helpful in improving all of our other marketing through social media. We learned a lot of tips and tricks about design from Elizabeth that have helped us focus our marketing ideas and gain confidence as marketers. As a new organization, we have limited resources and because of the availability of the Community Futures marketing coaching, we now have the ability to develop marketing plans on our own, which will contribute to the sustainability of our organization.</p> |
| <p>Whole Instinct Nutrition</p> | <p>Business advisory services and training</p> | <p>Community Futures supported Whole Instinct Nutrition with training and one-on-one support in digital marketing. Enhanced digital marketing skills will improve Whole Instinct’s ability to attract customers and improve revenue.</p> <p><u>Testimonial:</u> The help I received from Elizabeth & Community Futures was incredibly beneficial. When I took Elizabeth’s course a little while ago, during covid, I was just starting my nutrition consulting business, and I knew that marketing online was going to be a necessity for me to get my name out there and communicate with potential clients. Elizabeth not only provided wonderful information on actually understanding social media, SEO’s and how to utilize my website, but also gave me great suggestions and tips that I’ve been able to use for my business to this day, as the majority of my practice revolves around virtual sessions and digital community.</p> <p>I know that Elizabeth’s knowledge and friendly methods of teaching that information has truly allowed me to create a solid online foundation, and therefore allowed me to grow my business and my clientele despite the pandemic! I will always be grateful for Elizabeth’s support and am confident to this day that she will continue to be there to answer any questions or provide me with support and advice, big or small.</p> |

*Examples of possible outcomes: successfully guided companies to diversify and adapt during the COVID-19 pandemic, jobs created or maintained, growth in sales, new office(s) opened, new product(s) or service(s) created, impact on the community, successfully assisted companies to enter new markets, new export sales, investment attracted to a business, successful joint venture established, etc.

SECTION 5

Alignment with Government of Canada and PacifiCan Priorities in key areas

Please describe the initiatives or projects your organization was involved in that aligned with the PacifiCan 2021-22 operational priorities listed below:

Inclusiveness: Enhance economic well-being and prosperity of under-represented groups in British Columbia. PacifiCan’s primary focus for this priority is on supporting Indigenous peoples and women, with a secondary area of focus on youth and persons with disabilities.

Cluster Growth: Clusters are networks of interrelated companies, researchers, investors and other partners working in a specific industry or region. PacifiCan will focus on supporting select clusters within: clean technology; value-added agriculture; advanced manufacturing; digital industries; clean resources; and health and biosciences.

| | Strategy | Project/Initiative (2 – 3 sentences) | Outcome Achieved |
|------------------|--|---|--|
| 1 (a) | Inclusiveness – primary focus on Indigenous peoples and women | Workshops were delivered related to employment law, employment standards, cultural safety and human rights in the workplace. | 25 attendees |
| 1 (b) | Inclusiveness – secondary focus on youth and persons with disabilities | 8 4H loans were disbursed, providing funding for youth to purchase, raise and sell livestock. | Students were introduced to entrepreneurship. |
| 2 | Cluster growth – focus on specialized clusters within: clean technology; value-added agriculture; advanced manufacturing; digital industries; clean resources; and health and biosciences. | <p><u>FARMED: Connecting Producers to Consumers:</u> Project is focused on developing an interactive online web-based tool that will connect regional producers to consumers, support food security initiatives, and create social and economic connections across the North Cariboo.</p> <p><u>Cariboo Chilcotin Coast Tourism – Spark Program</u> The “Spark” Mentorships & Grants Program is designed to help tourism entrepreneurs, small businesses and non-profit organizations overcome challenges and barriers often experienced in bringing new tourism products to life. The program works by matching selected applicants with a tourism mentor, providing a \$3,000 seed grant as well as additional partner support to help develop new tourism experiences.</p> | <p>Project still under development.</p> <p>5 finalists pitched their ideas to the judges panel on Mar 22. 3 winners were selected.</p> |

**SECTION 6
Performance Indicator Variance**

In the table below, please ensure a detailed explanation is provided if your organization did not meet an MPS.

| Performance Indicator | 2021-22 Target | 2021-22 Actual | If you did not meet an MPS, please provide a detailed explanation and a plan for ensuring the MPS will be met in 2022-23. |
|---|----------------|-----------------------------------|---|
| Indicate which Group the CF is in : | | Choose your assigned group | |
| Total # of community based projects (New PLUS Ongoing) | 6 | 6 | |
| # of business training session participants | 300 | 1026 | |
| # of business advisory services | 300 | 446 | |
| \$ value of loans (*) | 1,000,000 | 1,133,173 | |
| # of loans (*) | 15 | 35 | |
| # of Projects/Initiatives that align with GOC/PacifiCan priorities and (PLUS) # of Loans that align with GOC/PacifiCan priorities | 15 | 17 | |

*Total value of ALL loans and other investments approved where initial disbursements made

FOR REFERENCE ONLY:

| MPS | GROUP 1 | GROUP 2 | GROUP 3 |
|---|-----------|-----------|-----------|
| Total # of community based projects (New PLUS Ongoing) | 2 | 2 | 2 |
| # of business training session participants | 400 | 400 | 300 |
| # of business advisory services | | | |
| \$ value of loans | \$600,000 | \$400,000 | \$200,000 |
| # of loans | 12 | 8 | 6 |
| # of Projects/Initiatives that align with GOC/PacifiCan priorities and (PLUS) # of Loans that align with GOC/PacifiCan priorities | 3 | 2 | 1 |

SECTION 7
CF Web Reporting

Please provide the link to the 2021-22 Performance Results posted on your website.

| | |
|--|---|
| 2021-22 Performance Report on Website | https://www.cfquesnel.com/aboutus/ |
|--|---|

SECTION 8
Loans over \$150,000

Did your CF provide loans over \$150,000 in total to an organization in 2021-22 (i.e. include previous loans still outstanding)? Yes No

If **yes**, then please provide a list of all loans given over \$150,000 in total to an organization and provide the reasoning/justification behind providing those loans. Please use your internal file or client number and **not client name**. *Note: Your updated policy on loans over \$150,000 should have been provided to PacifiCan. If not, please attach to this report.*

| File # | Amount | Rationale for Loans over \$150,000 |
|--------|-----------|------------------------------------|
| 123456 | \$165,000 | Explanation |
| | | |
| | | |
| | | |

SECTION 9
Syndicated Loans

Did your CF participate in any syndicated loans in 2021-22? Yes No

If **yes**, please provide a list of any syndicated loans your organization may have been a part of.

Note: As per the Contribution Agreement (Schedule "G" - Investment Fund Administration Terms and Conditions), each participating CF may only provide up to \$150,000.

| Lead CF | Which CF reported the loan in the reporting system? | Amount Contributed by your CF | Total Loan Amount | Number of Partner CFs |
|-------------|---|-------------------------------|-------------------|-----------------------|
| 16-37 | 16-37 | 104,000 | 570,200 | 5 |
| Peace-Liard | Peace-Liard | 100,000 | 609,960 | 6 |
| | | | | |
| | | | | |

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SECTION 10

Loans with Interest Rates Less than Prime Plus 2% (Excluding RRRF Loans)

In 2021-22, did your CF provide loans with interest rates less than prime plus 2%, excluding RRRF Loans? Yes No

If yes, then please provide a list of all loans given and provide the reasoning/justification behind providing those loans with interest rates less than prime plus 2%. Please use your internal file or client number and not client name. **Note: Your new policy on interest rates less than prime plus 2% should have been provided to PacifiCan. If not, please attach to this report.**

| File # | Amount | Interest Rate | Rationale for interest rate less than prime plus 2% |
|----------|--------|---------------|---|
| 2021-701 | 1,500 | 0% | 4H youth loan, less than 1 year term |
| 2021-702 | 1,500 | 0% | 4H youth loan, less than 1 year term |
| 2021-703 | 1,500 | 0% | 4H youth loan, less than 1 year term |
| 2021-704 | 1,000 | 0% | 4H youth loan, less than 1 year term |
| 2021-705 | 2,000 | 0% | 4H youth loan, less than 1 year term |
| 2021-706 | 1,600 | 0% | 4H youth loan, less than 1 year term |
| 2021-707 | 2,000 | 0% | 4H youth loan, less than 1 year term |

SECTION 11

Investment Fund

1. PacifiCan Investment Fund Activity as of March 31, 2021

| Total Value of Loans Receivable | Total Number of Loans Receivable | Total Value of Loans Receivable over 90 days | Number of Loans Receivable over 90 days |
|---------------------------------|----------------------------------|--|---|
| \$5,185,102 | 118 | \$4,959 | 1 |

2. Equity Investment / Related Entities / Subsidiaries as of March 31, 2022

Does your CF have investments in equity, related entities or subsidiaries as of March 31, 2022? Yes No

If yes, please list them below.

| Company Name | Percentage of Shares | Dollar Value |
|--------------|----------------------|--------------|
| ABC Company | 25% | \$25,000 |
| | | |
| | | |
| | | |

3. FOR THOSE CFs WITH A FIVE-YEAR AGREEMENT : Interest transfers up to 75% of net growth (net growth = interest and other revenue – bad debt and other expenses) up to a maximum of \$100,000

Did the CF transfer interest in 2021-22? Yes No

If Yes, please list all interest transfers amounts, the activities, and the PacifiCan Investment Fund type. Note: Your updated policy on interest transfers should have been provided to PacifiCan. If not, please attach to this report.

| Activity | PacifiCan Investment Fund Source | Amount Transferred |
|----------|----------------------------------|--------------------|
| | Choose an item. | |
| | Choose an item. | |
| | Choose an item. | |
| | Choose an item. | |

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4. Interest transfers above 75% of net growth (net growth = interest and other revenue – bad debt and other expenses) or \$100,000 (not included in Section 3), and all interest transfers for those with two-year agreements

Did the CF transfer more than 75% of net growth or \$100,000 in 2021-22? Yes No

If yes, please list all interest transfer amounts, the activities, the PacifiCan Investment Fund type, and PacifiCan approved date. Note: Your updated policy on interest transfers should have been provided to PacifiCan. If not, please attach to this report.

| Activity | PacifiCan Investment Fund Source | Amount Transferred | Amount and Date PacifiCan Approved |
|----------|----------------------------------|--------------------|------------------------------------|
| | Choose an item. | | |
| | Choose an item. | | |
| | Choose an item. | | |
| | Choose an item. | | |

SECTION 12 Appeals

1. Please indicate the number of appeals the CF received in 2021-22. If there were no appeals, please enter “0” in the box.

| | |
|--------------------------|---|
| Number of Appeals | 0 |
|--------------------------|---|

SECTION 13 - OPTIONAL Highlights

1. This section is optional and is provided for you to showcase anything the CF does that you feel may be different from other CFs. This could include; best practices, interesting processes, unique services, meaningful community based projects or events, etc.

Northern CFs Shared Services
 CFNC has been contracted to provide digital marketing services and Microsoft Teams moderation/support to the 9 Northern CFs.
 Elizabeth has undertaken the following activities in 2021-22:

- The Shared Services - Marketing program has been a successful addition to the northern offices’ marketing efforts. With the direction of a steering committee, CFNC/Elizabeth created marketing campaigns for social and email marketing channels.
- The Shared Services - Teams program provided a platform for collaboration, and communication of all CF offices involved in the Taking Care of Business platform and CF Northern group. CFNC/Elizabeth took on the role of Teams Moderator providing training and support for all participants.
- CFNC/Elizabeth created the curriculum for and taught the Digital Marketing 101 course, digital marketing workshops, lunch n learn training and one on one coaching sessions with funding from the Mill Closure and Red Cross funded programs.

Community Futures BC – Client Relationships Management
 Building on the success of the Taking Care of Business program, we have been contracted by Community Futures BC to lead a project developing a Client Relationships Management / Partnerships web portal for BC Community Futures offices. The initiative is based on the success of the Taking Care of Business platform.
 There are currently 11 CF offices participating in the Taking Care of Business Program, with a total of 837 members.

SUBMISSION INSTRUCTIONS

- **PacifiCan does not require a signed copy of the Annual Performance Report as the Board Motion will demonstrate Board approval.**
- Please utilize the [PacifiCan Portal \(https://account.wd-deo.ca/en-CA\)](https://account.wd-deo.ca/en-CA) to upload the document **by May 31, 2022.**
- Please upload a copy of your Annual Performance Report in WORD format only. Please do not submit a PDF format.
- Make sure to click the “Notify Officer & Exit” button to complete the upload.
- If there are any issues, feel free to contact your PacifiCan officer.