



COOL AID'S PRIME OBJECTIVE

To optimize people, resources, and processes to improve the quality of life for at-risk citizens and our community

## Victoria Cool Aid Society STRATEGIC PLAN

# 2009/10 Balanced Scorecard Annual Report to the Community

*Looking Back ... Thinking Ahead*

July 23, 2010

- Executive Director’s Message** ..... 3
  
- Perspective & Performance Overview**
  - Progress on Strategic Priorities ..... 5
  - Summary Report Card ..... 6
  
- Financial Perspective**
  - Performance Synopsis & Perspective Report Card ..... 8
  - Objective F02..... 8
  - Objective F03..... 9
  - Objective F04..... 10
  - Objective F05..... 10
  - Objective F06..... 12
  - Thinking Ahead ..... 13
  
- Customer Perspective**
  - Performance Synopsis & Perspective Report Card ..... 14
  - Objective C01 ..... 14
  - Objective C02 ..... 15
  - Objectives C03 and C04 ..... 16
  - Objective C05 ..... 17
  - Thinking Ahead ..... 18
  
- Process Perspective**
  - Performance Synopsis & Perspective Report Card ..... 19
  - Objective P01 ..... 19
  - Objective P14 ..... 20
  - Objective P04 ..... 21
  - Objective P03 ..... 21
  - Objective P06 ..... 22
  - Objective P07 ..... 22
  - Objective P08 ..... 23
  - Thinking Ahead ..... 23
  
- Learning & Growth Perspective**
  - Performance Synopsis & Perspective Report Card ..... 25
  - About Our Staff..... 25
  - Objectives PD01 ..... 26
  - Objectives PD02..... 27
  - Objectives PD03 ..... 28
  - Thinking Ahead ..... 28
  
- Appendices**
  - A. Mission, Vision, and Guiding Principles ..... 30
  - B. Strategy Map..... 31
  - C. Strategic Objectives ..... 32

## Looking Back ... Thinking Ahead

Cool Aid remains dedicated to building community together. Our strategic planning process highlights our accomplishments in improving the lives of others through the provision of services, partnerships, and advocacy. Our methodology, the **balanced scorecard**, illustrates our commitment to an integrated way of monitoring and improving organizational performance and charting our milestones and achievements through four perspectives: financial, customer, internal process, and people development.

We are pleased to present Cool Aid's **fourth** annual balanced scorecard **report to the community**. As in the previous year, we continue to make significant progress in both strategic thinking and operations. Our 2009/10 report reflects that the agency remains in a strong position with regard to performance in service utilization, financial management, risk management, and staff development.

This year's report builds upon previous efforts to continuously **reach for the next level** in measuring and reporting on performance. The report includes more data tables, data sources, and an expanded performance synopsis under each perspective. Ultimately the quality of the report better illustrates our growth and progress in both strategic thinking and execution.



This past year was an active one for Cool Aid—one project reached closure, two ramped up, and one was started on its way. And in the midst of all this development work, we continued to provide a diverse range of housing, shelter, health and other support services for those most in need in our community. Thanks to the energy and expertise of Cool Aid's staff and partners, combined with the generosity of our volunteers and donors and the contributions of our funders, this year we have been able to:

- Open the doors to the Access Health Centre.
- Provide over 56,000 shelter bed nights and 177,000 hot meals to more than 1800 individual shelter clients.
- Break ground on Olympic Vista Apartments and begin the preliminary work to expand Swift House, which will increase our supportive housing stock from 256 to 315 units by the end of 2011.
- Deliver over 30,000 primary health and dental care appointments and welcome over 1,000 new patients.
- Oversee the construction of our new purpose-built emergency shelter on Ellice Street.
- Maintain our ability to help close to 1,000 individuals gain employment through our Casual Labour Pool and assist an average of 100 individuals each day on their paths to recovery, by providing a range of supports and services through REES (Resources, Education, Employment and Support)—despite a reduction in core funding.

Notably, in 2009 we took steps to align our key **strategic priorities** with **senior management performance outcomes**. The strategic priorities are a useful lens through which to view our strategic objectives. They identify activities or areas that crosscut balanced scorecard perspectives and objectives, and represent a time horizon of one to three years. From a performance management standpoint, this important step integrates individual plans with organizational goals that encapsulate a group of short-term high-priority initiatives.

The Victoria Cool Aid Society is built on a solid foundation that has allowed us to build our capacity, year after year, to better serve the needs of our community. Cool Aid has a **continuous improvement approach** at all levels of the organization—strategic, operational, and service delivery. We look for the positive and celebrate incremental successes. Within this culture of hope, there is no failure, only opportunities for new learning and growth.

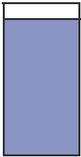
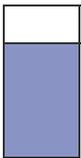
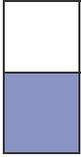
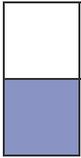
As this report demonstrates, Cool Aid is well-prepared to address and meet the challenges—and the opportunities—of the upcoming year.



## Progress on Strategic Priorities

Cool Aid’s strategic priorities are reviewed yearly in conjunction with strategic objectives, performance measures, and priority initiatives, as part of our annual planning cycle. Strategic priorities for 2009 were presented to the Board of Directors during their annual retreat and subsequently approved.

Strategic priorities arise from our annual assessment of issues and trends in the external environment. As such, they provide a useful lens through which to view our strategic objectives and assess our performance. They identify activities or areas that crosscut balanced scorecard perspectives and objectives, and represent a time horizon of one to three years.

<p>90%</p>  <p>progress</p>	<p><b>Priority 1—Update, enhance and develop contingency plans for areas of high potential risk</b></p> <ul style="list-style-type: none"> <li>• Develop budget scenarios in response to potential cuts to core funding.</li> <li>• Develop contingency plans for essential service delivery, in the event that collective bargaining results in work stoppages or slowdowns.</li> <li>• Develop scenarios to minimize/avoid pension plan liability.</li> <li>• Create pandemic and other emergency plans.</li> </ul>	<p>associated objectives</p>	<p>F04 F06 P07</p>
<p>80%</p>  <p>progress</p>	<p><b>Priority 2—Continue to respond to opportunities to increase housing stock for our target population</b></p> <ul style="list-style-type: none"> <li>• Actively participate with the Coalition to create new housing.</li> <li>• Promote Cool Aid Housing Program as a best practice model.</li> <li>• Respond to immediate needs for emergency shelter as opportunities arise and capacity permits.</li> </ul>	<p>associated objectives</p>	<p>P01 P04 C01</p>
<p>75%</p>  <p>progress</p>	<p><b>Priority 3—Move forward with internal and external service integration</b></p> <ul style="list-style-type: none"> <li>• Develop and implement a common client intake and case management approach within Cool Aid programs.</li> <li>• Work with the Coalition and government funders to ensure our internal systems support integrated information-sharing.</li> <li>• Actively participate with the Coalition initiative to integrate service delivery providers through the Streets to Homes pilot project and ensure alignment with internal initiatives.</li> </ul>	<p>associated objectives</p>	<p>P06 P14 P09</p>
<p>55%</p>  <p>progress</p>	<p><b>Priority 4—Sustain our efforts to influence, educate and learn from stakeholders</b></p> <ul style="list-style-type: none"> <li>• Utilize insights gained from the funder and partner survey to develop communication and other strategies.</li> <li>• Continue to play leadership roles within the community.</li> <li>• Cultivate new and nurture existing relationships.</li> <li>• Cultivate and preserve good neighbour relations (e.g., Ellice Street).</li> <li>• Develop a sustainable framework for eliciting stakeholder input (including client input).</li> <li>• Develop a communications framework/plan.</li> </ul>	<p>associated objectives</p>	<p>C01 C05 P03 P04 F03</p>
<p>50%</p>  <p>progress</p>	<p><b>Priority 5—Continue to refine our strategies for recruiting and retaining employees</b></p> <ul style="list-style-type: none"> <li>• Explore new avenues to promote Cool Aid as an employer of choice (identify possibilities, partnering with others).</li> <li>• Introduce a new agency-wide orientation process.</li> <li>• Build a sustainable infrastructure to more systematically capture and respond to staff input.</li> </ul>	<p>associated objectives</p>	<p>P03 P06 PD01 PD02 PD03</p>
<p>25%</p>  <p>progress</p>	<p><b>Priority 6—Improve internal systems to ensure organizational sustainability and service delivery integration</b></p> <ul style="list-style-type: none"> <li>• Develop an overarching information management framework (IMF).</li> <li>• Optimize the value of data as an organizational and community resource.</li> <li>• As much as possible, align external data requirements with internal systems.</li> </ul>	<p>associated objectives</p>	<p>P06 P09</p>

FINANCIAL Perspective		2007/08	2008/09	2009/10
F02	<b>Actively seek funding to deliver new or expanded services</b> MEASURE F02-1: Success in funding proposals for new or expanded services	✓	✓	✓
F03	<b>Diversify funding mix</b> MEASURE F03-1: Outcomes from new and ongoing fundraising initiatives	--	✓	✓
F04	<b>Maintain breakeven budget and ensure adequate reserves</b> MEASURE F04-1: Percent variance from budget	◇	◇	✓
F05	<b>Maximize utilization across Cool Aid</b> MEASURE F05-1: Service utilization	✓	✓	✓
F06	<b>Manage expenditures to drive efficiency and demonstrate accountability</b> MEASURE F06-1: Accountability performance	●	●	✓

CUSTOMER Perspective		2007/08	2008/09	2009/10
C01	<b>"Provide support, guidance and leadership in your fields of expertise"</b> MEASURE C01-1: Our participation in knowledge-sharing and leadership opportunities	✓	✓	✓
C02	<b>"Provide us with opportunities to contribute"</b> MEASURE C02-1: Our success at creating meaningful opportunities to contribute	✓	✓	✓
C03	<b>"Listen to my needs and be there when and where I need you"</b> MEASURE C03-1: What our clients tell us they need and how we respond to those needs	✓	◇	◇
C04	<b>"Make me feel safe and respond to me with dignity and respect"</b> MEASURE C04-1: Client satisfaction with safety and relationships with agency	●	●	◇
C05	<b>"Be a good neighbour"</b> MEASURE C05-1: Our performance in acting as good neighbours	✓	✓	✓

PROCESS Perspective		2007/08	2008/09	2009/10
P01	<b>Develop new and creative approaches for service delivery</b> MEASURE P01-1: Innovative approaches to service delivery and service expansion	✓	✓	✓
P03	<b>Seek input and learn from our stakeholders in order to provide meaningful solutions in our community</b> MEASURE P03-1: Progress in developing and implementing a stakeholder input framework	--	--	◇
P04	<b>Engage our stakeholders to communicate who we are and our capabilities</b> MEASURE P04-1: Communication initiatives	✓	✓	✓

Legend

- ✓ At or above plan
- ◇ Caution
- ✗ Below plan
- Performance rating or data not available
- Reporting not applicable for this period

PROCESS Perspective (cont'd)		2007/08	2008/09	2009/10
P06	<b>Develop and enhance systems and processes to empower effective decision-making and drive efficiency</b> MEASURE P06-1: Progress in developing and implementing an information management framework	--	--	◇
P07	<b>Continuously improve our ability to manage risk</b> MEASURE P07-1: Risk management actions undertaken	✓	✓	✓
P08	<b>Minimize negative workplace environmental factors</b> MEASURE P08-1: Percentage of employees who believe reasonable steps have been taken to prevent or reduce risk of violence MEASURE P08-2: Adherence to Environmental Risk Assessment	✓	◇	◇
P09	<b>Ensure compliance and consistency with regard to confidentiality and ethical behaviours</b> PERFORMANCE MEASURES IN DEVELOPMENT	--	--	--
P14	<b>Promote and provide an integrated approach to service development and delivery</b> MEASURE 14-1: Progress in developing and implementing an integrated service delivery approach	--	--	✓
P15	<b>Promote and implement responsible environmental practices (on hold)</b> PERFORMANCE MEASURES IN DEVELOPMENT	--	--	--

LEARNING & GROWTH Perspective		2007/08	2008/09	2009/10
PD01	<b>Hire, retain, and train to align resources and competencies</b> MEASURE PD01-2: Turnover rate for casual staff MEASURE PD01-3: Turnover rate for permanent staff MEASURE PD01-5: Progress in developing and implementing recruitment and retention strategies (new)	◇ ✓ --	◇ ✓ --	◇ ✓ ✓
PD02	<b>Nurture a culture that supports and advocates the importance of work/life balance</b> MEASURE PD02-1: Workplace stressors MEASURE PD02-2: Progress in mitigating workplace stressors	✓ ●	✓ ●	✓ ✓
PD03	<b>Foster a culture that embraces innovation, teamwork, leadership, and knowledge-sharing</b> MEASURE PD03-1: Our progress in fostering our desired organizational culture MEASURE PD03-2: Staff satisfied with their inclusion in innovation, teamwork, leadership, and knowledge-sharing	✓ ●	✓ ◇	✓ ◇

**Legend**

- ✓ At or above plan
- ◇ Caution
- ✗ Below plan
- Performance rating or data not available
- Reporting not applicable for this period

## FINANCIAL PERSPECTIVE

### About This Perspective

Cool Aid's Financial perspective focuses on two strategic themes: resource development and resource management.

### Performance Synopsis

Overall performance on both resource development and resource management objectives was strong in 2009/10. Some highlights from the year follow.

#### Variance from Budget

We closed 2009/10 with a surplus of \$4,327, relative to budgeted revenues of \$15.5 million.

#### Funding Diversification

Our ongoing capital campaign for the Access Health Centre raised \$903K in 2009/10. Through our direct mail initiatives, we tripled net proceeds, raised public awareness, and gained valuable insights into our donors, prospective donors, and giving patterns.

Seeking alternate sources of funding for our REES Program dominated fund development efforts in the fourth quarter.

#### Resource Utilization

All Cool Aid programs operated at or over capacity during 2009/10. We are seeing indications that demands for health care, shelter, housing, and support services are increasing.

#### Outlook for 2010/11

Environment of fiscal restraint is expected to continue into 2010 and beyond. Growing cost pressures and potential funding cuts are areas to monitor closely in the time ahead.

Perspective Report Card									
Measure	2009/10				Annual				
	Q <sub>1</sub>	Q <sub>2</sub>	Q <sub>3</sub>	Q <sub>4</sub>	07/08	08/09	09/10		
F02-1	✓	✓	✓	◇	✓	✓	✓		
F03-1	✓	✓	✓	◇	--	✓	✓		
F04-1	◇	✓	◇	✓	◇	◇	✓		
F05-1	✓	✓	✓	✓	✓	✓	✓		
F06-1	--	✓	--	✓	●	●	✓		

For descriptions of these measures, refer to the Summary Report Card on page 6.

#### Legend

- ✓ At or above plan
- ◇ Caution
- ✗ Below plan
- Performance rating or data not available
- Not applicable for this period

### Resource Development Objectives

Ripple effects from the global recession of 2008/09 continued to be felt throughout our fiscal year and, indeed, throughout the social services sector in Victoria.

In light of this economic environment, 2009/10 was not a good year in which to "seek funding to deliver *new* or *expanded* services" (objective F02). Instead, our fund development efforts focused on diversifying our funding mix (objective F03) and seeking alternate funding sources for our REES Program, which has been severely impacted by funding cuts.

"How do we select what money raised is going to be used for? Targeted fundraising is done throughout the year, through proposals, mailers, community supportive events that target specific programs. It's always connected with what we have identified as a need ... Undesignated funds get channelled to areas that have needs and/or are underfunded..." – from Nov. 2009 Board meeting

#### Objective F02

### Actively seek funding to deliver new or expanded services or programs

#### 2009/10 Proposals—Highlights

##### Streets to Homes Pilot Project

Cool Aid participated in two partnership proposals to the United Way for this initiative of the Greater Victoria Coalition to End Homelessness. The project aims to pilot an integrated approach to housing street-entrenched individuals, concurrent with necessary supports, modeled upon a similar successful program in Toronto. Status at year-end: Funding approved for Year 1; decision pending on Year 2 funding; the project is underway (see objective P14).

##### Every Step Counts (ESC)

Our REES Program submitted two proposals for this innovative program (see objective P01) in 2009/10. Status at year-end: One successful, one pending.



### Community Health Centre

**Point-of-Care HIV Research:** A collaborative project to determine the efficacy and role of point-of-care testing for the human immunodeficiency virus in community clinics (see objective P01). Status at year-end: Approved.

**Point-of-Care HIV Testing for Indoor Sex Workers:** A collaborative project to undertake point-of-care HIV testing at a local brothel and gather socio-demographic, risk factor, and attitudinal data on female indoor sex workers, a little-studied "hidden" population. Status at year-end: Decision pending.

**Electronic Health Research:** A collaboration between the CHC and the eHealth Observatory at UVic to explore the use of technology to improve the processes of care delivery. One component will examine how the CHC's real-world EMR data compares to developing national data standards and provide recommendations to the Canadian Institute of Health Information. Status at year-end: Decision pending.

### St. John the Divine Seasonal Shelter

Historically, Cool Aid has funded this shelter's operations out of surplus (2008/09) and deferred (2009/10) revenue, with the approval of BC Housing. In 2010/11, for the first time, St. John the Divine shelter operations are formally represented in our budget, subject to BC Housing approval of our budget proposal. Status at year-end: Decision pending.

### Potential Housing Opportunity

If successful with their bid on the 710 Queens Street Traveller's Inn property, the City of Victoria is committed to working with Cool Aid to convert this former motel into supported housing. In the spirit of partnership, we assisted with their application for federal Homelessness Partnering Strategy funding. Status at year-end: Decision pending.

### Downtown Community Activity Centre (DCAC)

A proposal to extend the hours of operation and programming support for DCAC. Status at year-end: Unsuccessful. We will renew our efforts in 2010/11.



## Objective F03

### Diversify funding mix

STRATEGIC  
PRIORITY  
#4

#### Fund Development in 2009/10

##### REES Program—Core Funding

OCTOBER 2009: REES learned that its budget would be cut by 60%, effective mid-December 2009—a reduction of about \$140,000 annually.

Securing alternate sources of operating funds for this essential Cool Aid service became a top priority for the balance of 2009/10 and continues into 2010/11. Among other initiatives, REES is now being included on the itinerary when prospective donors are given tours of the Access Health Centre.

Status at year-end: Of the many proposals submitted, two were successful (bridge funding), a few were unsuccessful, while the majority were pending decision.

Ironically, at the same time as considerable effort was being devoted to preparing funding proposals, referrals and demands for REES services have skyrocketed, in part because of funding cuts experienced by other social service agencies in the community.

##### REES Program in Brief

Started by people living with mental illness in 1999, REES uses a cooperative recovery-based approach, in partnership with families and professionals, to enhance the lives of people with mental illnesses or addictions.

- REES Resource Centre
- Community Casual Labour Pool
- The Mentoring Project
- Peer Community Links Program
- Community Outreach, Options and Links (COOL) Program
- Every Step Counts
- Pandora Thrift Shop (with Beacon Community Services)

+ monthly educational workshops + annual partnership conference + Resource Guide for Partners in Mental Health + Consumer Initiatives Fund + Concord News

##### Access Health Centre—Capital Campaign

The capital campaign, which began in 2008/09, is ongoing, with numerous proposals directed at foundations, corporations, and individuals during 2009/10. In addition, we are cultivating prospective major donors for a mortgage retiring contribution. These efforts yielded a total of \$903,000 in contributions in 2009/10.



As is true of many capital projects, the final million dollars is proving to be the most difficult to raise, especially now that the Access Health Centre is open. On the other hand, the last leg of the journey is being smoothed by the commitment, expertise and connections of several “community champions” (see objective C02).

**Direct Mail Initiatives**

Cool Aid first ventured into direct mail fundraising in 2008/09 with two mailings, expanding to four in 2009/10. Of the six mailings to date, our December 2009 mailing was by far the most successful. For that mailing, for the first time, we approached several professional groups, separately targeting Cool Aid suppliers and local dentists and doctors.

Direct Mail Net Proceeds	
2008 Aug	\$ 2,793
2008 Nov	8,091
2009 May	5,891
2009 Sep	3,537
2009 Dec	20,972
2010 Mar	2,505

In 2010/11, thanks to the vision for a “pharma campaign” of one of our Access community champions (Naz Rayani), we hope to replicate our December success with targeted mailings to individual pharmacists, pharmacies and pharmaceutical companies.

However, immediate financial gains are only one indicator of success of direct mail. Relationship-building and learning are among the long-term benefits arising out of these initiatives. We gain valuable insights into our donors, prospective donors, and giving patterns with each mailing that will help guide our development efforts in future years.



**Resource Management Objectives**

Objective F04

**Maintain breakeven budget and ensure adequate reserves**

STRATEGIC  
PRIORITY  
#1

**Variance from Budget**

Our fiscal year closed with a tiny surplus of \$4,327, relative to our 2009/10 budgeted revenues of \$15.5 million.

While this certainly represents a close-to-perfect breakeven status, there are implications for our 2010/11 budget. See Core Funding Outlook in the Thinking Ahead section.



Objective F05

**Maximize utilization across Cool Aid**

All Cool Aid programs operated at or over capacity during 2009/10. From a resource management perspective, this is an indicator of efficient operations. However, it is also a concern, in part because it means there is very little room for flexibility. We are seeing more and more indications that service demands are increasing—for health care, shelter, housing, support services—not just at Cool Aid but across the sector.



Resource Utilization in 2009/10

Shelter Program

Due to data integration improvements, we are now able to report, for the first time, the number of unique individuals who access our various shelters annually.

In 2009/10, Cool Aid provided overnight shelter and hot meals to more than 1,800 individual clients. Preliminary analysis suggests that one in five of these clients accessed overnight services *only* at our seasonal shelter at St. John the Divine church, which speaks to the benefits of having some diversity in shelter provision.

"A minimal-rule, easy-to-access shelter in addition to the larger, multi-service sites clearly reaches out to more people than a single program can." – from quarterly report to the Board, Shelters Program

The magnitude of these numbers surprised even us, and we are working together with the Salvation Army—the only other year-round shelter provider in Victoria—to compare data and see if we can arrive at an overall number of distinct people who have accessed both of our shelter programs.

Housing Program

In 2009/10, Cool Aid managed 256 supportive housing units for vulnerable adults, including those with mental illnesses and addictions. That number will grow to 315 units over the next two years.

"With the addition of two new tenants, Fairway Woods is running at full capacity. By moving tenants internally from our other buildings, we have been able to meet the changing needs of our tenants, while opening up much needed vacancies in the downtown Victoria area." – from quarterly report to the Board, Housing Program

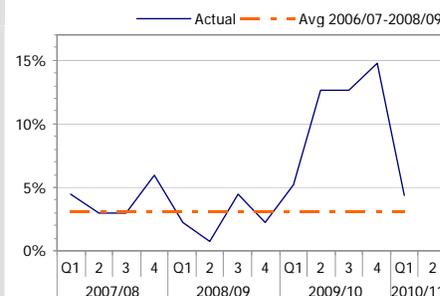
**Hillside Terrace**—During 2009/10, quarterly vacancy rates for seven of Cool Aid's eight housing sites varied between 0% and 6.4%. The exception was Hillside Terrace.

Between 2006/07 and 2008/09, Hillside Terrace's average quarterly vacancy rate was 3.1%. In 2009/10, the quarterly average was 11.3%; vacancy levels began rising in the second quarter and peaked in Q4.

Many different factors can affect vacancy levels. Unlike market housing, in supported housing, the intake process can be quite complex. When multiple players and partners are involved, the potential for bottlenecks to arise is always present.

Beginning in Q2 2009/10, we worked closely with our funders and partners to identify and mitigate the factors contributing to higher than usual vacancy levels. By Q1 2010/11, Hillside Terrace's vacancy rate had returned to normal.

**Hillside Terrace—Quarterly Vacancy Rates**  
As a result of 2009/10 mitigation efforts, rates returned to normal in Q1 2010/11.



Community Health Services (CHC)

In its new location at the Access Health Centre, our Community Health Centre is now able to provide health care services to more people than was possible in its cramped quarters on Swift Street. More examination rooms and an additional dental chair are among the advantages.

Early indications show a marked increase in CHC utilization. Comparing Q4 2009/10 to Q4 2008/09, there were 20% more medical and dental encounters. Notable are the following fourth-quarter increases:

- 27% — number of new medical patients
- 90% — number of new dental patients
- 80% — number of nurse encounters

While it is much too early to draw conclusions about future utilization patterns, we can probably expect increased utilization levels over time due to the CHC's storefront location.



Objective F06

**Manage expenditures to drive efficiency and demonstrate accountability**

STRATEGIC  
PRIORITY

#1

Key Accomplishments in 2009/10

Cost Management

The Finance department and program managers review costs and variances from budget throughout the year. In addition, price checking and vendor optimization are done on a regular basis by each department. Among the areas that received particular attention in 2009/10 were the following:

**Food**—Reviewed sources of food cost increases to improve decision-making around the number of meals to provide and the quality and quantity of ingredients to purchase (Shelters).

"... we are looking very carefully at all of our controllable costs and finding ways to operate with a bit less than we are used to in recent years. To date, the staff and shelter folk have all been very understanding and coming up with lots of cost-saving ideas to help us run as efficiently as possible." – from Q4 2009/10 report to the Board, Shelters Program

**Rents**—Worked with funding agencies to improve processes for filling vacancies in order to ensure people are housed as soon as possible and to minimize the impact on Cool Aid of reduced rents (Housing).

**Pest control**—Review of costs of, and best service provider for, bedbug elimination (Housing).

"Across our country, bedbugs have made a thundering comeback from high-end hotels to supportive housing, with this building being no exception. In order to help mitigate this ..., we will create a room in the basement of the building that will be set up with equipment to exterminate bedbugs." – from quarterly report to the Board, Housing Program

**Security**—Negotiations for security services for the Swift/Store street area (Shelters).

**Staffing**—Adjustments to staffing in Housing and Shelters have also helped reduce costs. For example, one vacant position in Streetlink will not be filled until the new Ellice Street shelter opens.

**Office supplies**—Price-checking on office supplies; review of cell phone usage and plans (Central Services).

Employee Benefits Management

After a comprehensive review of benefit plans currently in place, the Finance and Human Resources departments recommended switching from several benefit carriers to a single benefit carrier group. We anticipate cost savings of about \$36,000 annually plus a reduction in administrative time and enhanced benefits for employees.

"Administrative services will be greatly enhanced with an online benefit management system. This will enable staff in payroll and human resources to look after our group benefits quickly and easily by eliminating the form-filling paper chase associated with traditional benefits administration." – from Labour Management Committee meeting, Sept. 2009

Financial Processes & Systems

**Roles**—The roles within the Finance department were further refined during 2009/10 and some shifting of responsibilities took place to better meet the needs of the organization.

**Policy**—Recommendations were made with respect to a number of financial and human resources policies.

**Tracking**—Improved tracking and control mechanisms have been put into place in various functions.

**Payroll**—Changes were made to the payroll system to automate and optimize certain processes. Enhanced reporting tools are being used to better track and monitor payroll-related information.

Costing & Targeting Task Group

Between October 2009 and March 2010, Cool Aid's executive director participated in this BC Housing task group. The task group's final draft report proposes two interrelated frameworks to assist social housing providers, funders and others in decision-making on social housing projects, outlined below.

#### Social Housing Cost Target Framework

The intent is to serve as a guideline for non-profit housing societies by providing a target project cost, which they can then compare to their actual project cost. It provides cost control while allowing for design flexibility.

The framework is a comprehensive costing model that incorporates line items for all project costs associated with a social housing development. The cost factors were established through extensive research on 20 projects representing a broad range of developments. It addresses a significant gap in social housing delivery: the absence of a formula to determine acceptable project costs.

#### Housing Need and Demand Study Template

The template is intended to provide a tool that can be used by non-profit housing societies to objectively determine local housing need.

The template explores a comprehensive range of community factors that will have an impact on community needs, and accommodates both quantitative and qualitative data.

The template and the accompanying document—Housing Need and Demand Study: Links to Data Sources—address a significant gap in social housing delivery: the lack of tools to assist social housing proponents to complete a need and demand study for their project.

source: Executive Director's reports to the Board

## Thinking Ahead . . . on Resource Development & Resource Management

### Financial Processes & Systems

**Information technology**—We will be looking to introduce new software, reporting, and automation tools to improve efficiencies and quality of information in finance, payroll, and employee management.

**Harmonized sales tax**—At the time of writing, the HST had just been implemented. The net impact on expenditures is difficult to determine as it depends on the mix of taxable supplies and services. The higher cost of services may be offset by a larger rebate on supplies. At this stage, we anticipate that the net impact will be close to zero.

**Investments**—In 2010/11 we will be reviewing our investment policies and more proactively managing our investments to improve our returns.

### Operating Cost Pressures

A number of cost and resource issues emerged during 2009/10 that will continue to be areas of concern, in part because several of them are essential expenditures that are not fully funded or are unfunded, among them: pest control, rising food costs, building maintenance, security, and client surveys.

### Core Funding Outlook

To deliver core services to homeless and at-risk adults, Cool Aid relies heavily on government funding. Consequent to the 2008 global recession, cuts in government funding for a broad spectrum of social services dominated the news in 2009/10. The next two years are expected to be characterized by continuing tight fiscal restraints, with further funding cuts a real possibility.

We were able to mitigate the impact of the drastic cuts to REES funding (effective Dec. 2009) for the balance of 2009/10. The outlook for 2010/11, however, is uncertain.

Our 2010/11 budget is the tightest in years. A significant amount of deferred revenue was used to balance revenues and expenditures.

Further belt-tightening is always possible but, at some point, there will be repercussions for service delivery. It is not just a matter of serving fewer clients or offering fewer services. The risk is that further cuts will affect the *type* of clients that Cool Aid can help. For example, over the last few years, our Housing program has increasingly accommodated a higher proportion of referrals with complex or multiple challenges.

"Throughout the year, we have also been operating our Streetlink shelter at 96 beds, which is 16 beds over our funded capacity. As we are entering a time of fiscal restraint we have, regretfully, reverted back to our regularly funded capacity of 80 beds." – from Q4 2009/10 report to the Board, Shelters Program

# CUSTOMER PERSPECTIVE

## About This Perspective

Cool Aid's bottom line is based on the five strategic objectives that comprise the Customer perspective. For purposes of this perspective, "Customer" includes both clients and community.

## Performance Synopsis

Overall performance on our Customer objectives remained strong in 2009/10. We did, however, fall short in one area—improving how we *document* performance in listening and responding to clients. Some highlights from the year follow.

### Partnering for Service Integration

We worked with our partners on the Streets to Homes pilot project as well as various working groups of the Greater Victoria Coalition to End Homelessness.

### Being a Good Neighbour

Our Next Steps shelter received a good neighbour award. A shared security arrangement between Cool Aid and area businesses significantly improved the Store/Swift Street environment.

### Making a Difference—Client Contributions

Our health clinic piloted a client-facilitated hepatitis C support group. Positive client feedback led to a similarly structured diabetes support group. Based on client input, meditation sessions were introduced.

Residents of Sandy Merriman House unveiled a stunning canvas and published the first issue of their new magazine *MizPlaced*, which shares women's stories of homelessness.

Some 50 tenants helped foster a sense of community at Cool Aid housing sites by undertaking caretaking, gardening and other activities.

### Making a Difference—Community Contributions

Community champions, a new kind of volunteer for Cool Aid, raised awareness of the Access Health Centre among community and business leaders.

Perspective Report Card									
Measure	2009/10				Annual				
	Q <sub>1</sub>	Q <sub>2</sub>	Q <sub>3</sub>	Q <sub>4</sub>	07/08	08/09	09/10		
C01-1	✓	✓	✓	✓	✓	✓	✓		
C02-1	✓	✓	✓	✓	✓	✓	✓		
C03-1	--	--	◇	◇	✓	◇	◇		
C04-1	--	--	◇	◇	●	●	◇		
C05-1	✓	✓	✓	✓	✓	✓	✓		

For descriptions of these measures, refer to the Summary Report Card on page 6.

### Legend

- ✓ At or above plan
- ◇ Caution
- ✗ Below plan
- Performance rating or data not available
- Not applicable for this period

## Objective C01

**"Provide support, guidance and leadership in your fields of expertise"**

**STRATEGIC  
PRIORITY**  
#2, 4

## Partnering & Collaboration in 2009/10

### Greater Victoria Coalition to End Homelessness

Formed in February 2008, the Coalition is a regional organization of service providers in the non-profit and public sectors, advocates, business representatives and elected municipal officials committed to ending homelessness in Greater Victoria.

Cool Aid is one of the key partners in the Coalition's Streets to Homes pilot project (see objective P14). Cool Aid staff were also active participants in several Coalition working groups in 2009/10:

- Housing (see objective P01)
- Service Integration (see objective P14)
- Prevention
- Communications and Community Engagement

### 2009 Funder & Partner Survey Results

#### On Partnering & Collaboration

What we learned from our colleagues:

- Our survey specifically targeted individuals from what we consider to be "partner agencies." To discover that one out of four respondents saw their organizations as neither partners nor funders was therefore a real surprise—one that we will explore in our next survey.
- Many of our colleagues share our interest in and commitment to partnering (although they were not always aware of our mutual interest).
- More than one-third of all comments spoke directly to some aspect of partnering, collaboration or knowledge-sharing.

### Thrift Store Partners

A new Pandora Street thrift shop—a partnership between Cool Aid’s REES Network and Beacon Community Services (BCS)—opened July 2009 in the retail space below Desmond House. Brimming with learning opportunities, this bona fide retail environment is staffed by BCS employees and volunteers recruited from our REES program, our tenants, and users of other Cool Aid services. On-the-job training and discounts on merchandise—in a safe, meaningful and respectful environment—are among the benefits that the volunteers enjoy.

### Knowledge-Sharing in 2009/10

#### Where

Abbotsford, Chilliwack, Comox, Courtenay, Duncan, Langford, Port Alberni, Port Hardy, Squamish and Victoria are among the municipalities with which Cool Aid shared knowledge in 2009/10.

#### How

Tours of Cool Aid facilities, presentations, meetings, workshops, student mentoring, media interviews, networking, and committee memberships are some of the ways in which we share knowledge.

#### Knowledge-Sharing Topics

- A sampling—needle exchange
- harm reduction
- small suite design
- supported housing
- mental health & addictions
- inner-city health care
- bio-hazard cleanup
- client intake criteria

### Leadership in 2009/10

#### British Columbia Non-Profit Housing Association (BCNPHA)

In 2008/09, Cool Aid’s executive director was elected to the Board of the BCNPHA as a director-at-large for a three-year term. In 2009/10 she served as the association’s treasurer.

This past year, BCNPHA was actively involved in a BC Housing-initiated process to identify the issues and challenges facing the development consultant sector in BC in the context of a changing and increasingly complex social housing delivery environment (see objective F06). As a representative of a significant housing segment within BCNPHA, Kathy was invited to participate in one of four task groups that emerged from this process.

As a representative of BCNPHA, Kathy attended the Co-operative Housing Federation of Canada’s AGM in May 2009—an excellent opportunity to network with others from across the country involved with social housing.

#### Unsung Hero

Cool Aid’s executive director was among the candidates nominated for the Unsung Hero Award, an initiative of First Unitarian Church of Victoria and the Community Council.



#### Objective C02

#### “Provide us with opportunities to contribute”

In an average year, Cool Aid provides opportunities for about 200 clients and community members to make a contribution—to make a difference—by volunteering services in a wide variety of ways. During a major-event year, like our 40<sup>th</sup> Anniversary or the Homeless Needs Survey, that number can easily double. In this year’s report, we want to highlight some of the contributions made by our clients.

### Making a Difference—Client Contributions

#### Building Community, from the Inside Out

In most of Cool Aid’s housing sites, all caretaking and gardening are undertaken by tenants, who receive a small honorarium as a token of our appreciation. When tenants have the opportunity to take on responsibility for their environment, they gain an increased sense of respect for themselves and for each other and a more positive outlook on life—important stepping-stones. In 2009/10, about 50 tenants helped create a sense of community with their efforts. Some examples of the fruits of their efforts:

Desmond House	Pandora Apartments	FairWay Woods	Hillside Terrace	Johnson Manor
"Tenant cleaners continue to do a great job and take pride in their accomplishments."	"... a team of tenants has been actively working together to uphold clean and healthy standards within the building and become responsible and efficient workers."	"The ... landscaping is in excellent condition thanks to our contracted gardener and tenants who are working together in taking care of the flowers and shrubs."	"Our garden is in full bloom and looks great thanks to the efforts of a few tenants who have stepped up in the wake of the passing of our #1 gardener."	"One of our new residents is an avid gardener and has already been getting the greenhouse ready for this year's growing season. We look forward to seeing the results in the coming season."

– from quarterly reports to the Board, Housing Program

### Shelter Artists

JUNE 2009: The unveiling of a stunning wall-size canvas and short film created by the women of Sandy Merriman House, coached by artist volunteer Melanie Schambach, generated much interest in the community and in the press.

### Shelter Writers

DECEMBER 2009: Sandy Merriman House residents published the first issue of *Mizplaced*, a magazine whose focus is to share women's personal stories of homelessness. Residents were wrapping up their second issue as our fiscal year ended. The magazine is one outcome of a series of writing workshops, introduced spring 2009, which are facilitated by Literacy Victoria.

### Peer Support in Health Care

Cool Aid's clinic now has the space to pilot new client-centred services. One such innovation is the weekly hepatitis C support group co-facilitated by a client and a nurse.

As group leader, the client facilitates and provides peer support that is grounded in experience, both with the treatment (successfully completed) and with recovery (five years since being a street-entrenched addict). Feedback from the group has been so positive that the clinic has launched a similarly structured diabetes support group.

**Hepatitis C FYI**  
Treatment entails an intensive and prolonged (6-12 months) regimen with side effects so severe that most are unable to work during treatment. Peer support is a strong contributor to successful treatment outcomes.

## Making a Difference—Community Contributions

### Community Volunteers

The contributions of our many volunteers—individuals, community groups, and businesses—are diverse. In 2009/10, dedicated volunteers helped with food preparation and serving at our shelters, did reception at our dental clinic, mentored clients at REES, maintained the clothing room at Streetlink, assisted with gardening at housing sites, revamped the gardens at Sandy Merriman House, acted as running partners in Every Step Counts (see objective P01)—and so much more.

### Community Champions

A new type of volunteer has also emerged, what we call "community champions." These are community-spirited individuals with the ability and the passion to influence others. In 2009/10, these dynamic individuals worked with Cool Aid to raise awareness of the Access Health Centre among community and business leaders. Our sincere thanks to Oak Bay mayor Chris Causton, Mel Cooper, Victoria mayor Dean Fortin, Fiona Hyslop, Ken Kelly, Naz Rayani, Rob Reid, and Sandra Richardson.



### Objectives C03 & C04

**"Listen to my needs and be there when and where I need you"**

**"Make me feel safe and respond to me with dignity and respect"**

A thumbs-down for performance on these objectives is warranted because we did not make much progress toward our 2008/09 commitment to improve how we document performance in this area.

We know that our performance on these objectives is excellent but we recognize the need to be able to *demonstrate* that to our funders and other stakeholders—with hard data. The challenge here remains not in meeting the objectives but in *demonstrating* that we meet them (see also objective P03). In the interim, we can offer some examples of how we listened and responded to clients in 2009/10.

Listening & Responding to Clients in 2009/10

Housing Program

Pandora Apartments

"Staff and tenants continue to work together to develop efficient and effective preventative measures to combat the bedbug issue that affects many [buildings] throughout the city."

Mike Gidora Place

"Staff established a tenant phone room on the 3rd floor that has been a complete success. Tenants who cannot afford a phone of their own now have the ability to make calls to their case managers, family members, and so forth. Their feelings of independence have increased as a result."

FairWay Woods

"One of the tenants placed an ad on a local website requesting donations for exercise equipment; this resulted in several donations, ... we are working on setting up in an exercise room."

Hillside Terrace

"The new catering contract has been extended ... the chef is doing a nice job in working with the tenants in creating a menu that almost everyone enjoys! Along with coffee, tea, milk and water, we now offer 100% pure apple and orange juices at meal times. This has been well received by all."

– from quarterly reports to the Board, Housing Program

Health Services

Clients were consulted on potential uses for the group room at the new Access Health Centre. Four-week meditation sessions arose out of that consultation.

**Meditation**—"There has been a great deal of documented evidence on the positive results of meditation ranging from lowering blood pressure to helping with sleep patterns... Many of the changes are not that easy to classify and are often stated as 'just feeling better' or 'I feel more present' but all indicate very positive shifts in awareness and self-care." — Eric Chandler, counsellor, Community Health Centre

Shelters Program

Sandy Merriman House

Client comments about shelter services—a sampling:

"Staff is excellent. Meals nutritious. I felt as safe as one could be."

"Although I have had many stays here, each time has been consistently as enjoyable and safe as my own home."

"I would not be alive today without this home. Please protect it."

"Can't say enough good but one suggestion would be having help with finding a place ... transportation ... help with interviews with landlords."

"We need more time than 24 hrs or less to collect our belongings ... otherwise our every belonging is thrown in the garbage ... Give us 2 or 3 days please!"

– from a pilot client satisfaction survey

Streetlink

Changes in response to client input—a sampling:

- Facilitated healing program based on first nations' beliefs introduced.
- Kick Crack support group launched.
- Women's support group started.
- Shelter behaviour guidelines adapted and simplified. Now have progressive consequence chart for not following guidelines.
- Coffee cart set up in the morning for early risers.
- Upstairs beds opened earlier for early sleepers.
- Changes to intake and orientation process for new clients.
- New supervised laundry room procedure developed by clients and staff; has reduced damage to machines and improved security for belongings.

– from quarterly reports to the Board, Shelters Program

Objective C05

"Be a good neighbour"

STRATEGIC  
PRIORITY  
#4

Being a good neighbour is a continuous ongoing process, well-integrated into our daily operations. When a new building is anticipated, however, those routine operations are augmented by a more formal relationship-building process, which may include a formal good neighbour agreement.

Key Accomplishments in 2009/10

Swift/Store Street Neighbourhood

New security arrangements were launched in May 2009 as part of a joint venture between Cool Aid and several area businesses—the outcome of the consultations that occurred in 2008/09. In the ensuing months, both clients and neighbours commented on the noticeable improvements in the area's environment.

"We have heard a lot of positive feedback from Streetlink clients, neighbourhood residents, and Swift House residents, saying that things are much quieter around the building and they do feel safer." – from quarterly report to the Board, Shelters Program

Next Steps Neighbourhood

JUNE 2009: The North Park Neighbourhood Association awarded our Next Steps shelter a good neighbour plaque.

"So far, it's the first shelter I've ever heard of receiving such an award." – Shelters manager

### Ellice Street Shelter Neighbourhood

Our discussions with the Neighbourhood Working Group resulted in good progress toward a formal good neighbour agreement. As we collectively work through several drafts, all parties remain committed to the process. The goal: a formal good neighbour agreement signed and executed by October 2010.

### Olympic Vista Neighbourhood

We continued to consult with stakeholders in the Mount View neighbourhood about plans for Cool Aid's new 36-unit housing development. There is general support for the project and we have some strong supporters. When rezoning was approved in October, many people spoke in support of it and of Cool Aid.

#### 2009 Funder & Partner Survey Results

##### On Being a Good Neighbour

- What we learned from our colleagues:
- Most significant was the finding that one in three respondents were unfamiliar with our good neighbour practices.

### Access Health Centre Neighbourhood

To ensure good neighbour relations continue to be maintained, Cool Aid and other Access partners drafted a community engagement plan in 2009/10, which was circulated to the Johnson Street Stakeholders Group for feedback. The main feedback received: the group is happy with its new neighbour and wants to meet on an "as needed" basis rather than regularly.



## Thinking Ahead . . . about Clients & Community

### Client Advocacy

We began considering new avenues for client advocacy in 2009/10, to supplement (not replace) our current efforts.

Among the options under review is a closer collaboration between Cool Aid's Board of Directors and the boards of other compatible organizations, for the purpose of advocacy.

### Client Satisfaction Surveys

While most client input is elicited in the course of normal operations, in 2010/11 we anticipate obtaining some input through formal client satisfaction surveys. For example, our 2010/11 report will include highlights from the client satisfaction survey being undertaken by Cool Aid's health clinic.

### Community

Cool Aid's good neighbour efforts will continue in 2010/11.

One neighbourhood—the Swift/Store Street area—will soon see a change. In anticipation of the opening of the new Ellice Street shelter (fall 2010), we have already begun planning for the conversion of the Streetlink shelter into new supported housing units.

#### 2009 Funder & Partner Survey Results

##### On Client Advocacy

- What we learned from our colleagues:
- Not everyone agrees with—or recognizes—Cool Aid's particular form of advocacy, which includes knowledge-sharing, networking, and relationship-building.
  - Some of our colleagues feel that effective client advocacy is compromised when there is heavy reliance on government funding.
  - Some respondents felt that Cool Aid's advocacy efforts were too narrow, that we advocate for only one segment of the homeless population. That perception helped us identify an area for improvement: clearer communication of the difference between who we advocate for and who we serve.

# PROCESS PERSPECTIVE

## Perspective Report Card

Measure	2009/10				Annual		
	Q <sub>1</sub>	Q <sub>2</sub>	Q <sub>3</sub>	Q <sub>4</sub>	07/08	08/09	09/10
P01-1	--	--	--	--	✓	✓	✓
P03-1	--	--	--	◇	--	--	◇
P04-1	✓	✓	✓	✓	✓	✓	✓
P06-1	--	--	●	◇	--	--	◇
P07-1	✓	✓	✓	✓	✓	✓	✓
P08-1	--	--	--	--	✓	◇	◇
P08-2	--	--	--	--	✓	●	◇
P14-1	--	--	--	✓	--	--	✓

For descriptions of these measures, refer to the Summary Report Card on pages 6-7.

### Legend

- ✓ At or above plan
- ◇ Caution
- ✗ Below plan
- Performance rating or data not available
- Not applicable for this period

### About This Perspective

The Process perspective comprises nine strategic objectives, each focused on business processes that we have identified as strategically important. Below, we report our progress on seven of these objectives.

### Performance Synopsis

We demonstrated strong performance on four of the seven Process objectives we are reporting on for 2009/10.

While progress occurred on all fronts, measures for three of these objectives earned a thumbs-down because we did not meet expectations on some overly ambitious initiatives. A few highlights from the year follow.

#### Service Delivery Innovations

Every Step Counts captured both local and national attention with its unique fusion of running and regeneration.

Our client services workers provided support services to more than 350 shelter clients and helped find housing for half of them.

The Community Health Centre collaborated in research on point-of-care service delivery.

#### Service Integration

Through the Streets to Homes pilot project, Cool Aid and its partners on the Greater Victoria Coalition to End Homelessness laid the foundations for an integrated case management process.

#### Stakeholder Engagement

We premiered a documentary and history of Cool Aid's 40 years of service, launched a new magazine, began exploring social media, and laid the foundations for a communication plan.

#### Systems Enhancements

We implemented a new online employment application form, introduced a new human resources dashboard, and began examination of our payroll and other HR information needs. Progress on developing an information management framework, however, was minimal.

#### Risk Management

Contingency planning for emerging risks dominated the year. In the forefront were: actual and potential cuts to core funding, expiration of the current collective agreement, the new pension plan, and a possible pandemic (H1N1).

We developed a new process and complementary policy for worksite inspections, to be implemented in 2010/11.

### Objective P01

#### Develop new and creative approaches for service delivery

STRATEGIC  
PRIORITY  
#2

#### Key Accomplishments in 2009/10

##### Every Step Counts...Especially the First Step

Founded by the Victoria Foundation and hosted by Cool Aid's REES Network, this unique running program marked its first anniversary in February 2010. ESC harnesses the benefits of running and teamwork to foster self-esteem, confidence, energy and positive growth for individuals experiencing challenges with addiction, mental health, poverty, homelessness and other social issues. It further adds value through complementary activities like monthly wellness talks.



"I believe this program has done more to improve self-esteem and integrate these people into society than most of my medical interventions ..." – Dr. David Bell, physician to several ESC runners

In just over a year, more than 120 participants have made 2,500 individual runs, which included participation in the Times Colonist 10K. In September 2009, ESC expanded from one running group to two to accommodate all those who want to participate.

The program “draws its strength and dignity from each individual who comes out to run or walk. We are all equals in our running gear, which means we can leave our histories, diagnoses and financial situations at the door. That is powerful.” – ESC Program Coordinator

Feedback from Every Step Counts participants:

“Every Step Counts has saved my life.”

“I have lost 40 lbs and I love running.”

“I feel like I finally have a family and great friends.”

“I have gone from sleeping 2 hours a night to a solid 8.”

“We did the 10K!”

– from REES Network

### Client Services Workers (CSWs)

Since their introduction in March 2008, client services workers have become essential to the Shelters program. By the end of 2009/10, CSWs had a caseload of about 350 clients and succeeded in housing 50% of them.

Unlike other Shelters staff, CSWs work one-on-one with clients, guided by each client’s strengths and needs, to develop a goal-oriented action plan and facilitate its implementation.

In addition to finding housing for clients, CSWs assist with seeking financial assistance, making medical appointments, and other many activities that are challenging for individuals with mental health or addictions issues. Once housed, clients come back to the shelter for drop-in services and CSWs continue to follow-up with clients to help ensure successful maintenance of their housing situations.

CSWs work closely with other agencies to provide client supports. As part of Cool Aid’s commitment to work with community partners, Streetlink hosts twice-monthly meetings between our CSWs and members of the ACT and VICOT teams, Pacifica, the Salvation Army, and MSDH to coordinate services for mutual clients.

“While the social service community as a whole grapples with integration, our CSWs continue to quietly build bridges and bring together multiple agencies and people to serve individual clients.” – from quarterly report to the Board, Shelters Program

### Point-of-Care HIV Research

Our Community Health Centre collaborated with AIDS Vancouver Island and a University of Victoria researcher to determine the efficacy and role of point-of-care testing for the human immunodeficiency virus in community clinics.

Evidence from the study strongly supports the role of POC testing in a community setting, especially among intravenous drug users. We are hopeful that provincial policy-makers will be prompted by the findings to fund these tests on an ongoing basis.

The study also resulted in the identification of several new HIV clients who are now receiving treatment.

#### Why Point-of-Care HIV Testing?

- Current standard of practice in BC: Draw a tube of blood and ship it to the lab for processing. Results available in 2-3 days.
- More than half of test recipients do not return to get their HIV results.
- Studies have shown that people are less likely to spread HIV if they are aware of their HIV-positive status.
- POC testing: Take a “finger prick” blood sample (similar to testing blood sugar for diabetes). Results available in minutes.
- With POC testing, health care practitioners are better able to identify infected individuals, promote infection control measures, and provide appropriate medical care to insure best possible outcomes.

### Objective P14

## Promote and provide an integrated approach to service development and delivery

STRATEGIC  
PRIORITY

#3

### Laying the Foundations for Service Integration

#### Streets to Homes Pilot Project

Through the Coalition’s Service Integration Working Group, Cool Aid, Pacifica Housing, and other partners are actively developing the Streets to Homes (S2H) pilot project and overseeing its rollout. To date, the working group has developed and agreed upon the protocols, standards and processes that all partners will apply.

The pilot aims to house 120 homeless adults in scattered market units (using rent supplements) in 2010/11,

applying a standard integrated case management process from intake to exit. Clients can enter the program through any partner using the same intake process. Once entered, they will be assessed for priority and fit by a front-line workers committee (including a Cool Aid client services worker (see objective P01)) that will assign them to housing and a follow-up support worker (the client will stay with the initial contact person until they are assigned housing). A Streets to Homes employee will be located at the Access Health Centre.

Objective P04

**Engage our stakeholders to communicate who we are and our capabilities**

STRATEGIC  
PRIORITY  
#2, 4

Key Accomplishments in 2009/10

New Magazine

Two issues of *Cool Views*, Cool Aid's new magazine, were published in 2009/10. With its appealing, easy-to-read format, the magazine is a new vehicle for communicating "who we are and our capabilities." It aims to reach a much wider audience than is possible with our other publications, including employees, donors, funders, volunteers, and clients.

COOLVIEWS

Access Health Centre

DECEMBER 2009: On World AIDS Day, Cool Aid and AIDS Vancouver Island (AVI), together with partners, funders and clients, celebrated the grand opening of the new centre.



Documentary Premiere

OCTOBER 2009: The premiere screening of our documentary—40 Years of Cool Aid Culture—occurred during Homelessness Action Week. During that week, the film also aired on Shaw TV, Channel 11, in many time slots. A 30-second TV public service announcement is airing on Shaw in 2010/11.



Creative Minds

OCTOBER 2009: We hosted a lunch and brainstorming session with communication professionals who have been helping Cool Aid. The event brought forward many good ideas that will help shape our future communication strategies. One of the recommendations: develop a stronger Cool Aid identity to raise awareness in several areas (e.g., Cool Aid services, client needs, the need for funding, external factors that impact services).

Objective P03

**Seek input and learn from our stakeholders in order to provide meaningful solutions in our community**

STRATEGIC  
PRIORITY  
#4, 5

We made progress in several areas during 2009/10. Nevertheless, a thumbs-down for performance is warranted because we achieved less than planned on the main initiative associated with this objective: the development and implementation of a stakeholder input framework.

Accomplishments & Progress in 2009/10

2009 Funder & Partner Survey—Outcomes

We produced two reports in 2009/10 derived from this survey: an interim report summarizing responses to multiple-choice questions (JUNE 2009), followed by a final report that highlighted what we had learned from our colleagues (FEBRUARY 2010). Both reports were shared with all those originally invited to participate in the survey.

These reports are the tangible products of an intense internal learning process. Not only did we learn about how our colleagues view us (the goal of the survey), we also learned, by trial and error, *how to learn* from surveys, particularly from the wealth of comments that respondents provided. That process of learning will eventually be captured in our stakeholder input framework.

### Client Input & Involvement

As outlined under objectives C03 and C04 (pages 16-17), client input and involvement in service development and service delivery permeates every Cool Aid program. One area where we need to improve is in how we document and communicate these processes to others—a challenge we continue to work on.

Client involvement in governance is another area we have been exploring.

**Strategic Research**—Through a university partnering initiative, Cool Aid had the opportunity to explore several strategic areas of interest. One of them focused on client participation in governance. Under the mentorship of Cool Aid's executive director, a graduate student examined sustainable, best-practice methods to ensure that clients have a voice at the governance level, that is, in shaping organizational strategic priorities and policy. The resulting report identifies areas for further study, which, resources permitting, we hope to undertake in 2010/11.

#### 2009 Funder & Partner Survey Results

##### On Client Input and Involvement

What we learned from our colleagues:

- Comment analysis revealed mixed levels of awareness of the extent to which Cool Aid elicits client input and involves clients in both service development and service delivery.

This suggests we have not effectively communicated our client involvement philosophy and practices.



### Objective P06

#### Develop and enhance systems and processes to empower effective decision-making and drive efficiency

**STRATEGIC  
PRIORITY**  
#3, 5, 6

While we made progress in several areas in 2009/10, the thumbs-down for performance is warranted because we achieved less than anticipated on the main initiative associated with this objective: the development and implementation of an information management framework.

#### Key Accomplishments in 2009/10

##### Online Application Form

During 2009/10, we developed and implemented a new online employment application form, which is now well integrated into our hiring process. We are monitoring for anticipated benefits such as shorter turnaround time and improved selection of relevant candidates. There are already some early indications of added value resulting from the combination of standardized information and key questions like "Why do you want to work for Cool Aid?":

- The online process seems to encourage more interaction and follow-up from applicants.
- It is much easier to compare applicants on essential qualifications like education and training.

##### Payroll & Scheduling

As 2009/10 drew to a close, a consultant was examining our payroll, scheduling and related HR information needs and will offer recommendations regarding software options in the new fiscal year.

##### HR Dashboard

Human Resources introduced a new quarterly dashboard in 2009/10. The dashboard's three categories—Workforce Demographics, Productivity, Recruitment and Retention—include several new HR metrics, based on metrics developed by the British Columbia Human Resource Managers Association.



### Objective P07

#### Continuously improve our ability to manage risk

**STRATEGIC  
PRIORITY**  
#1

#### Key Accomplishments in 2009/10

##### Risk Management Process

Cool Aid implemented a formal risk management process in 2006. The risk management policy identifies reporting responsibilities for the assessment, mitigation and review of identified risks. Mitigation measures are identified, implemented and periodically reviewed for all risk items in our risk registry. Risk items above a certain risk threshold are also brought to the attention of our Board of Directors.

In 2009/10, Cool Aid management and Board were successful in their mitigation efforts of the top risks identified during the year. Two of the outcomes from that process:

- Shelters and Health programs developed contingency plans for the H1N1 pandemic.
- Contingency plans related to the new pension plan costs were developed.



#### Objective P08

### Minimize negative workplace environmental factors

Cool Aid has in place a comprehensive framework of policies and processes for health and safety, violence prevention, and incident management. Our Occupational Health and Safety Committee, which includes representatives of both staff and management, meets regularly to discuss matters related to workplace safety, including reported incidents, training needs, policy revisions, and emerging issues.

In 2009/10, however, this objective warrants a thumbs-down because (1) we did not survey staff on their attitudes regarding steps taken to prevent or reduce the risk of violence in the workplace (measure P08-1), and (2) we did not undertake an environmental risk assessment of all of our sites (measure P08-2).

#### Strategic Assessment

Our original goal was to carry out these two initiatives in alternating years. With the benefit of hindsight, it has become abundantly clear that neither of the two initiatives, as originally envisaged, is sustainable over time. Resources are simply not available to undertake the type of comprehensive site assessment and survey process we started out with.

#### Work Safety Management

After taking a hard look at available resources and possible alternatives, we decided to try out a different type of site inspection, one that is more sustainable than our original organization-wide comprehensive site inspection.

During 2009/10, we laid the foundations for smaller-scale regular site inspections that can readily be incorporated into normal operations, the core of which is a worksite checklist and complementary policy. Unlike the biannual comprehensive assessment of all sites, these monthly or quarterly site inspections can be effectively carried out concurrently by staff and supervisors.

Worksite inspections are key activities in the prevention of accidents. Their purposes are to:

- Identify existing and potential hazards.
- Increase awareness leading to the prevention of workplace accidents and illnesses.
- Ensure compliance with legislative standards and regulations.

The results of individual site inspections will be reviewed during Occupational Health and Safety Committee meetings.



### Thinking Ahead . . . on Internal Processes

#### Potential Supportive Housing Opportunity

In the summer of 2009, 12 Travellers' Inn motels became available when the company that owns them filed for bankruptcy. Through the Coalition's Housing Working Group, the City of Victoria is actively pursuing ownership of two of the properties and is working with Cool Aid to potentially operate one of them as supportive housing for 36 individuals who are currently homeless.

#### Service Integration

Stronger integration with external partners will continue to be our focus for 2010/11, to bring closer the goal that "every door is the right door" for those seeking help.

Cool Aid will use the training opportunities and lessons learned provided through the S2H project to ensure that all of our staff are operating from the same perspective.

#### Communication Plan

A number of factors coalesced to generate strong interest in formalizing our communication policies through a multi-year communication plan, in particular, results from our 2009 funder and partner survey and ideas proposed by the Creative Minds group.

#### Social Media Pilot

Social media offer new opportunities for engaging with stakeholders in real time, which several of our partners (e.g., Victoria Foundation) already use.

Cool Aid began testing these waters in late 2009/10 with its own Twitter account. We started with Twitter in part because it appeals to an older demographic (35+). Among the 50 followers our twitters have already attracted are several funders and partners.

#### Information Management Framework

We made some modest progress toward this initiative in 2009/10 by setting up an Information Management Advisory Committee (IMAC). However, translating the original vision into actionable terms of reference proved to be much more difficult than anticipated.

Rather than a comprehensive information management plan (the original vision), a more practical goal might be to limit our vision to a few high-priority items with a short time horizon and potential for immediate benefits. Among the items that meet these criteria are the following:

- A high-level inventory of information resources at Cool Aid, based primarily on standard forms currently used by different programs and departments. This inventory would give us a solid foundation from which to move forward.
- A detailed inventory of how different Cool Aid programs elicit client input and involvement, with particular emphasis on whether and how client input is documented (e.g., captured in meeting minutes). A potential starting point would be the high-level client participation matrix we first developed in 2008/09.

#### Seeking & Learning from Stakeholder Input

The development of a stakeholder input framework (see objective P03) remains a goal but our short-term priorities are to: (1) improve documentation of client input and (2) implement a sustainable staff survey process.

#### Risk Management

Several of the risks that emerged in 2009/10 continue to be closely monitored in the new fiscal year, in particular, actual and potential cuts to core funding and collective bargaining.

Our current collective agreement expired on March 31, 2010. All parties are cognizant of the government's mandate of net-zero increases for the term of the new agreements. We will continue to monitor the Community Social Service Sector bargaining process until a new agreement is finalized.



#### 2009 Funder & Partner Survey Results

##### Awareness of Cool Aid Services

What we learned from our colleagues:

- An unexpected number of respondents noted the need for greater awareness of Cool Aid's services—either for themselves or more broadly in the community.

## LEARNING & GROWTH PERSPECTIVE

### About This Perspective

The Learning & Growth perspective, also known as the People Development perspective, is the foundation of our strategy map. Within this perspective, we align recruitment, retention and training with complementary objectives on workplace culture and work/life balance, in order to be equipped to change, grow and achieve our prime objective.

### Performance Synopsis

Overall performance on Learning & Growth objectives is strong, although we did fall short on a couple of areas (measures PD01-2 & PD03-3). Some highlights from 2009/10 follow.

#### Recruitment Strategies

A new pension plan and integrated benefits coverage will help make Cool Aid more competitive and attractive to potential candidates.

Job descriptions for some 100 Housing and Shelter support workers were evaluated and gaps addressed, resulting in benchmark changes.

Two new Cool Aid bursaries will strengthen our partnership with Camosun College and help attract qualified job applicants.

#### Fostering Culture

To help foster core Cool Aid values among new employees, staff and managers co-developed the curriculum for an agency-wide employee orientation. These new half-day sessions will complement program-level staff orientations and, we anticipate, positively affect staff retention.

#### Learning from Staff

We remain committed to improving how we elicit and learn from staff input. Formal staff surveys need to be complemented by other, less resource-intensive methods of learning from these key stakeholders.



### About Our Staff

#### Total Staff

At the close of 2009/10, Cool Aid had 226 employees, an increase of 7 employees (3%) over the previous year. Three permanent positions remained unfilled at year-end.

#### New Hires & Terminations

Cool Aid hired 74 new employees during 2009/10, a decrease of 25% over 2008/09.

Sixty-six employees left Cool Aid during the year, an 8% increase over 2008/09. Of the 66 terminations, 54 (82%) were voluntary.

#### Permanent vs. Casual staff

Two-thirds of our staff were permanent, one-third casual in 2009/10—virtually identical to 2008/09.

#### Gender

Cool Aid's gender profile in 2009/10 was unchanged compared to 2008/09: 62% female, 38% male.

#### Age

In 2009/10, the average age of Cool Aid employees was 41.

About 47% of our employees were over the age of 40, virtually unchanged compared to the previous two years.

### Perspective Report Card

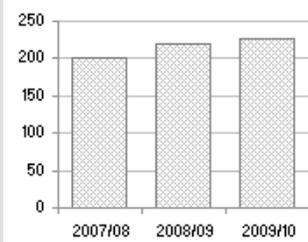
Measure	2009/10				Annual			
	Q <sub>1</sub>	Q <sub>2</sub>	Q <sub>3</sub>	Q <sub>4</sub>	07/08	08/09	09/10	
PD01-2	✗	✓	◇	◇	◇	◇	◇	
PD01-3	◇	◇	✓	✓	✓	✓	✓	
PD01-5	--	--	--	✓	--	--	✓	
PD02-1	✓	✓	✓	✓	✓	✓	✓	
PD02-2	--	--	--	--	●	●	✓	
PD03-1	--	●	--	✓	✓	✓	✓	
PD03-2	--	--	--	◇	●	◇	◇	

For descriptions of these measures, refer to the Summary Report Card on page 7.

#### Legend

✓	At or above plan
◇	Caution
✗	Below plan
●	Performance rating or data not available
--	Not applicable for this period

Total Staff

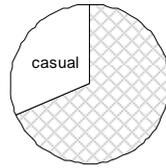


Tenure

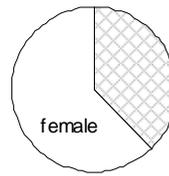
At the end of 2009/10, the average tenure for permanent employees was 4.5 years of service at Cool Aid. For casual employees, the average was 1.43 years of service.



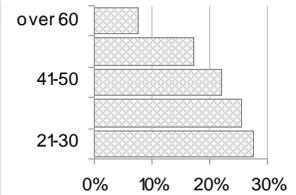
Permanent vs. Casual Staff



Gender



Age



STRATEGIC PRIORITY  
#5

Objective PD01

Hire, retain, and train to align resources and competencies

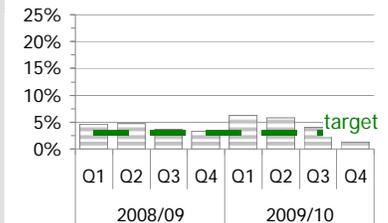
In this sector, recruitment and retention bring unique challenges and remain an area of focus for Cool Aid. We are fortunate to have relatively low turnover among our permanent staff. We did earn a thumbs-down for one measure (PD01-2) because the turnover rate for casual staff exceeded targets in three out of four quarters. The retention of casual staff, particularly those with less than one year with Cool Aid, is an emerging area of interest.

Staff Turnover (measures PD01-2 & PD01-3)

We monitor and assess actual turnover rates, on a quarterly basis, relative to quarterly targets. For permanent employees, the quarterly target is 3% or less (annualized, 12%). The quarterly target for casual staff is 10% or less (annualized, 40%).

Periodically, we also compare our turnover rates to those reported for the social services sector by the Community Social Services Employers Association (CSSEA), which reports on turnover semi-annually. At the time of writing, the most recent CSSEA turnover data was for the first six months of 2009.

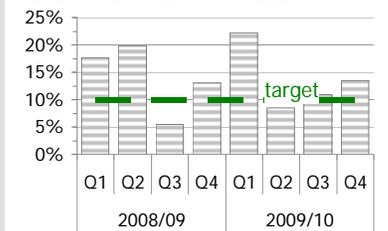
Permanent Staff: Turnover Rates



Turnover—Permanent Staff <sup>1</sup>

In 2009/10, Cool Aid's annualized turnover rate for permanent staff was 17.4%, slightly higher than in 2008/09 (16.4%). For "regular employees" on Vancouver Island, CSSEA reports a decline in annualized turnover rates, from 14.0% to 11.8%, between 2008 and 2009 (up to June).

Casual Staff: Turnover Rates



Turnover—Casual Staff

Our annualized turnover rate for casual staff was 55.1% in 2009/10, virtually unchanged from 2008/09 (55.9%).

In the social services sector on Vancouver Island, CSSEA reports annualized casual turnover rates as high as 50.1% (July-Dec. 2008) and as low as 22.0% (Jan.-June 2009) over 18 months in 2008 and 2009. Unlike regular (non-casual) staff, there is no discernible upward or downward trend in turnover rates for casual staff during this period.

Recruitment & Retention Strategies (measure PD01-5)

Bursaries

SPRING 2010: Cool Aid strengthened its partnership with Camosun College by sponsoring bursaries for School of Health and Human Services students: the Victoria Cool Aid Society Community Mental Health Worker Certificate Award (sponsoring two students) and the Interprofessional Mental Health and Addictions Award (sponsoring one student).

<sup>1</sup> Cool Aid's and CSSEA's categories do not correspond exactly but are similar: CSSEA's regular employees are defined as non-management and excluded, non-paraprofessional, non-casual. Cool Aid's data for permanent employees includes management and paraprofessionals.

Cool Aid is not involved in the selection process but we did attend the 1st Annual Student Awards Tea (June 2009), where we learned that one of our practicum students and one of our employees had earned two of the three Cool Aid awards.

#### Pension Plan

SPRING 2010: Cool Aid geared up for training, education and enrolment to a new pension plan available to all Cool Aid employees (in lieu of the RRSP matching option previously in effect). This new benefit ensures parity between unionized and exempt staff and makes Cool Aid more competitive with other employers in terms of retirement benefits.

The new plan—the Municipal Pension Plan—is one of a number of public sector pension plans administered by the British Columbia Pension Corporation. It is the same plan that covers employees in the municipal sector, health sector and many other employee groups across the province. The plan's portability may attract some candidates who might not otherwise have considered Cool Aid.

#### Employee Benefits Management

FALL 2009: Cool Aid implemented a significant change to its employee benefit framework, moving from multiple carrier groups to a single carrier group. In addition to cost savings (see objective F06), the new integrated framework provides a number of enhanced benefits to employees, improved disability management services, and efficiencies in enrolments, changes and cancellations for our various employee groups.

#### Job Classification Changes

SUMMER 2009: With 100-plus employees in tenant or shelter support positions, periodic review of these job descriptions is essential to ensure that they continue to accurately reflect job responsibilities and qualifications. In our latest review, we found a number of gaps between job descriptions and actual frontline worker responsibilities and duties, which were resolved by a benchmark change for many staff in the Housing and Shelter programs.



#### Objective PD02

### Nurture a culture that supports and advocates the importance of work/life balance

STRATEGIC  
PRIORITY  
#5

Cool Aid is committed to promoting a culture of health and wellness among our staff. Elements that support attendance and work/life balance initiatives include monitoring, communicating, and understanding absences and the need for periodic extended leaves.

#### Progress in 2009/10

#### Overtime Management

FALL 2009: We undertook a review of our overtime usage, which led to several process changes for overtime approvals. As a result, total overtime usage in 2009/10 was 30% less than that recorded in the previous fiscal year.

#### Absenteeism Management

We also began to lay the foundation for stronger absenteeism management during the year. As with overtime management, we aim to be more systematic in how we monitor, report on, and respond to absenteeism patterns, with the goal of supporting staff. Stronger absenteeism management will include the exploration of mitigating strategies as well as healthy workplace initiatives.

#### Work/Life Balance

In managing absenteeism, other health-related issues may be raised including work/life balance initiatives. Throughout this past year, all Cool Aid programs have supported staff through various extended time off arrangements in order to travel, pursue educational opportunities, deal with family issues, or manage the balance between work and home responsibilities.



Objective PD03

**Foster a culture that embraces innovation, teamwork, leadership and knowledge-sharing**

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PRIORITY  
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### Fostering Cool Aid Values

Clearly articulating and reinforcing the organization's core values ensures a greater degree of employee alignment and increased employee commitment. When employees are oriented to and aligned with organizational culture, there is an opportunity for a better understanding of and connection to the purposes and goals of the organization. The outcome: Everyone is heading in the same direction.

#### Agency-wide Orientation

JANUARY 2010: Staff orientations already take place on many levels. An *agency-wide* orientation, with a broader and cross-program focus, is an initiative we had considered for some time. In late 2009/10, Staff Development Committee members—both staff and managers—collaborated to develop the framework and materials for such an orientation.

We will debut the new half-day agency-wide orientation in fall 2010, with the goal of facilitating the integration of new employees by reinforcing Cool Aid's core vision, values, accomplishments and priorities, introducing them to all our programs and services, and providing opportunities to meet other new staff as well as senior staff.

"We want new staff to walk away knowing that following client-centred core values is a performance expectation." – from Staff Development Committee meeting minutes, Feb. 2010

"The orientation program is designed to provide a general overview of the organization, its key services and accomplishments, ... our community development and partnering initiatives, ... our core values and how they relate to working at Cool Aid, ... how staff can get involved. Essentially we want to impart an overall sense of inclusion for new employees." – from quarterly report to the Board, Human Resources Department

## Thinking Ahead . . . on Learning & Growth

#### Recruitment and Retention

The importance of developing proactive recruitment and meaningful retention strategies in conjunction with program managers and staff continues to be a priority. Particularly within a sector where there is always a need for trained staff, exploring new and creative strategies is front and centre.

#### Promoting Cool Aid

Whether through advertising, networking, job fairs, or promoting the benefits and learning opportunities we offer, our external recruiting efforts will be a priority for the foreseeable future.

#### Staff Surveys

What are we doing well? Where do we need to improve? Like our funders and partners, our employees are key stakeholders in Cool Aid.

Learning from staff remains a priority for Cool Aid and we are committed to conducting a staff survey in the later part of 2010. The challenge is how to do that in a manner that is both responsive and responsible—and sustainable over time. Our experience with the 2009 funder and partner survey taught us that *doing* a survey is the easy part; *learning* from, and acting upon, the results is much harder, requiring time and resources that are in short supply.

#### Other Learning Opportunities

There are also more modest, concrete steps we can take that will expand our ability to learn from staff, among them:

- Automate existing event-driven staff surveys, specifically, exit surveys and 60-day new employee surveys.
- Develop a process to better integrate and cross-reference data from these two surveys.
- Nurture the strategic role that the Staff Development Committee recently demonstrated on the new agency-wide orientation initiative.

#### Collective Bargaining

Our existing collective agreement expired March 31, 2010. Although there was an attempt to bargain issues prior to the expiration of the agreement, no consensus was reached. Collective bargaining will recommence in the fall and we will monitor potential language changes and prepare for local issues discussions.

#### Interpreting Results

We intend to develop additional ways of analysing and reporting on our HR data in 2010/11.

#### Leveraging Technology

In 2010/11 we will be introducing HR HTML forms. One such form will improve the submission of employment applications. This technology will be easier for prospective applicants to complete, and allow us to track response rates and timelines and to make updates quickly.



### Our Mission

We act to end homelessness by working in partnership with others to develop community-based solutions. We are committed to working in a non-judgmental way with adults experiencing marginalization in Greater Victoria by advocating for and providing emergency shelter, supportive housing, integrated health care and other support services.

### Our Vision

The Victoria Cool Aid Society works to eliminate homelessness and improve our quality of life by working with others to build a community where:

- No one is forced to sleep on the street or go hungry.
- Everyone who needs supportive housing is getting it.
- Integrated health care service to treat illness and promote wellness is provided.
- Integrated services are provided to those with mental health and addiction issues.

### Our Guiding Principles

We ...

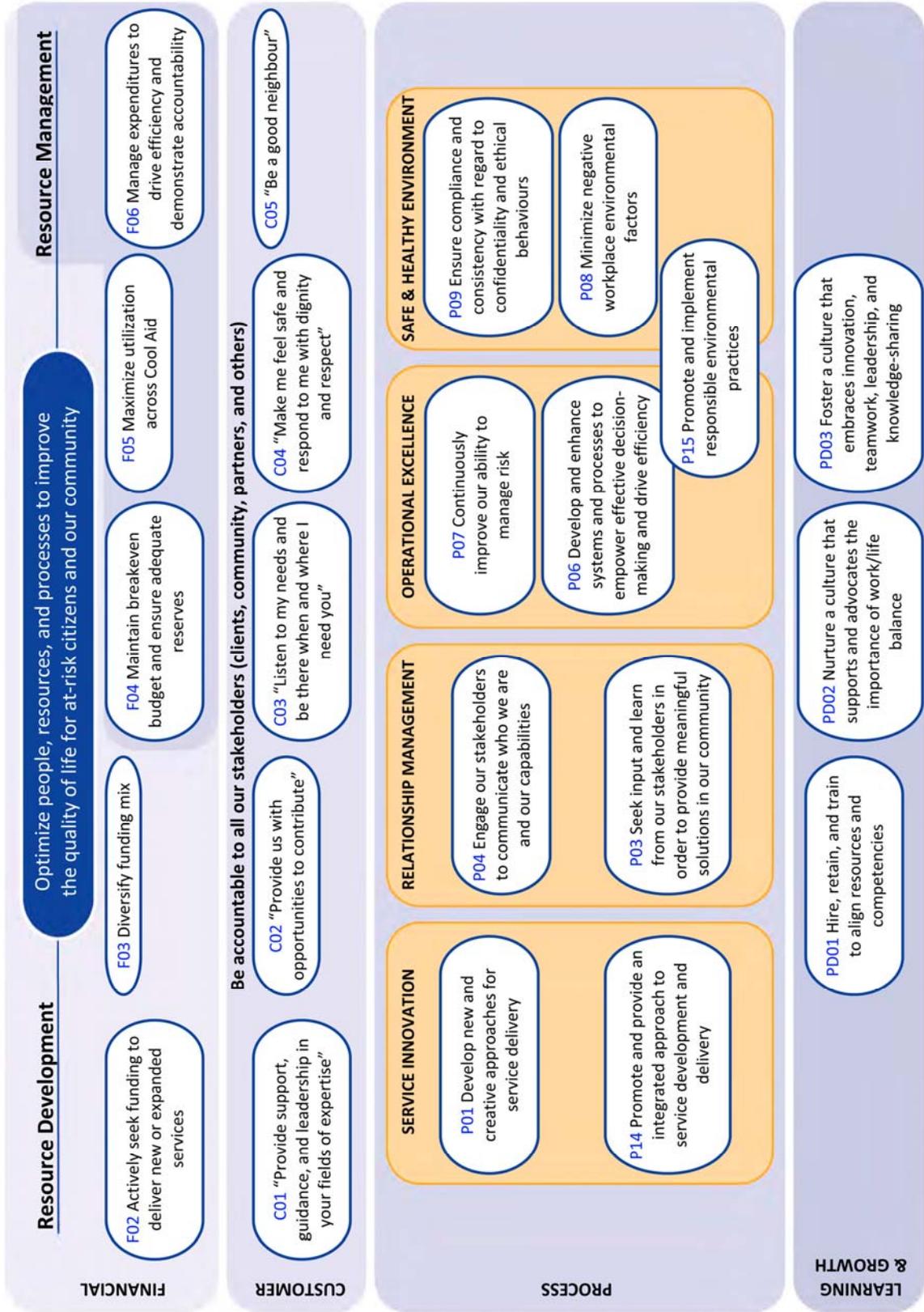
- demonstrate reliability, good faith, and integrity in all our relationships.
- foster a workplace culture that embraces innovation, teamwork, leadership, and knowledge-sharing.
- make and keep our commitments.
- are accountable for our actions and measure and share our contribution to the community.
- appreciate and acknowledge the contributions of our employees, volunteers, donors, and partners.
- support and value participation, build partnerships, and encourage shared leadership in our community.
- treat all people with respect, dignity, and fairness.
- try to look at things from our clients' point of view.
- are innovative, learn from our experiences and the input of others, and make effective change.
- are action-oriented and advocate for those we serve.
- are committed to promoting fairness and equity within our organization.



### Victoria Cool Aid Society Strategy Map

We provide holistic shelter, housing, and community health services to marginalized adults and, in partnership with others, work to eliminate homelessness and improve the quality of life in Greater Victoria.

[www.CoolAid.org](http://www.CoolAid.org) • (250) 383-1977



	Objective	What we mean by this objective	Theme
<b>Prime Objective</b>			
	Optimize people, resources, and processes to improve the quality of life for at-risk citizens and the community	Recognizing that we are a key provider of and advocate for housing, shelter and healthcare services in our community, we will ensure that our services are fully utilized and effective. We will look for innovative ideas and solutions to serve the at-risk citizens of Victoria.	Resource Development
<b>Financial Perspective</b>			
F02	Actively seek funding to deliver new or expanded services or programs	To ensure that we have the ability to be responsive to the emerging needs of our clients, we will actively seek funding for the expansion of existing services and development of new services.	Resource Development
F03	Diversify funding mix	Recognizing our need for autonomy and flexibility, we will actively seek to increase our reservoir of funding sources, so that we can be more responsive in meeting the future needs of our clients and our organization.	Resource Development
F04	Maintain breakeven budget and ensure adequate reserves	As a fiscally accountable organization, we will deliver balanced budgets, plan for capital asset replacements, and maintain adequate replacement reserves in order to manage our financial risk wisely.	Resource Management
F05	Maximize utilization across Cool Aid	Because demand for our services often exceeds our capacity, we will ensure that we are providing for as many clients as we can without compromising service quality.	Resource Management
F06	Manage expenditures to drive efficiency and demonstrate accountability	As a responsible organization, we will look for ways to manage our expenditures in order to generate cost savings, drive efficiency, and demonstrate transparency.	Resource Management
<b>Customer Perspective</b>			
C01	"Provide support, guidance and leadership in your fields of expertise"	Recognizing that the community sees us as a key social service provider and that we have a responsibility to be responsive to requests from partners, funders, and clients, we will share our knowledge and provide participative leadership and support to initiatives identified by ourselves and by others.	Clients & Community
C02	"Provide us with opportunities to contribute"	Recognizing the magnitude of our mission and that others wish to be a part of the solution, we will provide opportunities for volunteers, donors, clients, and others in the community to make a contribution.	Clients & Community
C03	"Listen to my needs and be there when and where I need you"	We will actively seek input from our clients and the community in order to adjust our programs and services in response to changing needs and circumstances.	Clients & Community
C04	"Make me feel safe and respond to me with dignity and respect"	Recognizing that many of our clients have had negative life experiences, particularly with respect to accessing systems and services, we will develop services that focus on respectful non-judgmental relationship-building, minimize bureaucratic barriers, and create a safe atmosphere by valuing clients as individuals who are coping with their daily lives as best they can.	Clients & Community
C05	"Be a good neighbour"	As a community partner, we recognize the importance of having positive relations with all who work and live, own property and businesses in all neighbourhoods in which we provide service. To this end, we will demonstrate good faith, integrity, reliability, respectful communication, and cooperative problem-solving in our relationships.	Clients & Community
<b>Process Perspective</b>			
P01	Develop new and creative approaches for service delivery	Recognizing that we must be responsive to changes in client needs and in the external environment, we will develop new and creative approaches for service delivery.	Service Innovation
P03	Seek input and learn from our stakeholders in order to provide meaningful solutions in our community	As a community-based organization, we recognize the value of input from clients, staff and others in assessing and improving our performance in service delivery, workplace satisfaction, partner and funder relations, and other areas.	Relationship Management

	Objective	What we mean by this objective	Theme
<b>Process Perspective (continued)</b>			
P04	Engage our stakeholders to communicate who we are and our capabilities	As there are many in our community who are not aware of our services or the issues of homelessness, poverty, and the circumstances of being marginalized, we will promote, educate, and advocate through various public mediums.	Relationship Management
P06	Develop and enhance systems and processes to empower effective decision-making and drive efficiency	As a multi-site and multi-service organization, we understand that we must strive for the right balance between centralized and decentralized processes. We will standardize, streamline, upgrade, and otherwise seek efficiencies in all of our processes, in order to enhance information-sharing and empower decision-making across the organization.	Operational Excellence
P07	Continuously improve our ability to manage risk	As a responsible organization, we will ensure that we have policies and processes to manage current and emerging risks in a comprehensive fashion.	Operational Excellence
P08	Minimize negative workplace environmental factors	The Society is committed to providing a safe work environment and will proactively identify, respond to, and, wherever possible, prevent the recurrence of negative workplace factors.	Safe & Healthy Environment
P09	Ensure compliance and consistency with regard to confidentiality and ethical behaviours	Recognizing that the type of information we collect is of an extremely sensitive nature, we will ensure that the gathering, storing, and dissemination of any personal information meet or exceed privacy legislation standards and follow clear and consistent internal guidelines.	Safe & Healthy Environment
P14	Promote and provide an integrated approach to service development and delivery	Recognizing that our client population is often required to access multiple services in order to have their needs met, we will champion an integrated approach to service development and delivery, and ensure that our own services are as barrier-free as possible.	Service Innovation
P15	Promote and implement responsible environmental practices	We recognize that we have a responsibility to minimize our environmental footprint. We will strive to increase environmental literacy among our staff, clients and tenants and implement greener practices in our operations and our facilities.	Operational Excellence/ Safe & Healthy Environment
<b>Learning &amp; Growth Perspective</b>			
PD01	Hire, retain, and train to align resources and competencies	We will develop an integrated system that aligns our recruitment, retention, training and development so that we have the right people, with the right skills, at the right time, in the right jobs.	Relationship Management
PD02	Nurture a culture that supports and advocates the importance of work/life balance	Recognizing that a healthy workplace results in improved outcomes and performance for both employees and Cool Aid as a whole, we will work safely, manage stress, prevent injuries, balance work and family, and promote workplace wellness, exercise, quality sleep, and conflict resolution.	Relationship Management
PD03	Foster a culture that embraces innovation, teamwork, leadership, and knowledge-sharing	Recognizing that we are diverse and decentralized, we will facilitate information-sharing and team development at all levels of the organization with the belief that meaningful participation is the first step to fostering an organizational culture of shared leadership, learning, and accountability.	Relationship Management