



COOL AID'S PRIME OBJECTIVE

In partnership with others, Cool Aid will end homelessness in Greater Victoria by 2018 while improving client quality of life.

## Listening, Learning, Action

---

Looking Back . . . Thinking Ahead

2011/12 Balanced Scorecard  
Annual Report to the Community  
(April 2011 to March 2012)

August 2012

<b>Executive Director’s Message</b>	
Looking Back . . . Thinking Ahead .....	3
<b>Strategic Plan &amp; Performance</b>	
Strategy Map .....	5
Measure Performance at a Glance .....	6
<b>Prime Objective</b>	
About the Prime Objective.....	8
Strategic Objectives	
1—End homelessness in Greater Victoria by 2018 .....	8
Thinking Ahead .....	8
<b>Stakeholder Perspective</b>	
About This Perspective .....	9
Strategic Objectives	
1—Increase housing stock .....	9
2—Expand health & support services .....	10
3—Improve service integration .....	11
4—Accelerate access to services .....	12
5—Strengthen service experience .....	13
6—Improve opportunities to contribute .....	14
7—Be a good partner .....	15
8—Be a good neighbour .....	16
Thinking Ahead .....	17
<b>Process &amp; Technology Perspective</b>	
About This Perspective .....	18
Strategic Objectives	
1—Launch housing development plan.....	18
2—Enhance systems, processes & reporting .....	19
3—Learn from others .....	20
4—Build community support .....	21
5—Demonstrate accountability.....	22
Thinking Ahead .....	23
<b>Learning &amp; Growth Perspective</b>	
About This Perspective .....	24
Strategic Objectives	
1—Attract & retain qualified staff .....	24
2—Expand training & development .....	25
3—Strengthen health & safety .....	26
4—Improve employee engagement .....	27
Thinking Ahead .....	28
<b>Financial Perspective</b>	
About This Perspective .....	29
Strategic Objectives	
1—Obtain additional funding .....	29
2—Expand funding base.....	29
3—Optimize resource utilization .....	30
Thinking Ahead .....	31

## Executive Director's Message

### Looking Back . . . Thinking Ahead

I am pleased to present Cool Aid's **sixth** annual balanced scorecard **report to the community**, one of the key deliverables of our strategic planning process.

Our strategic planning framework continues to be based on the **balanced scorecard**, which utilizes four **perspectives**—Stakeholder, Process & Technology, Learning & Growth, and Financial—through which to illustrate our commitment to monitor and improve organizational performance and chart our milestones and achievements.

In the first quarter of 2011/12, the Board of Directors and Management Team embarked upon a refresh of our strategic plan. Three new **strategic themes** emerged through this process: Create/Expand Services, Improve Operational Effectiveness and Strengthen Stakeholder Engagement. Each theme represents integration across perspectives of the high-level business strategies that we will achieve in order to realize our overarching strategic goal or **prime objective**.

#### Prime Objective

**In partnership with others, Cool Aid will end homelessness in Greater Victoria by 2018 while improving client quality of life.**

Thanks to the ongoing support of our funders, the generosity of our volunteers and donors, and the energy, expertise and dedication of Cool Aid's staff and partners, we had a successful operating year, providing an integrated system of shelter, housing, health, and other support services for those individuals most in need in the Capital Region.

Following are some highlights from the past year as well as a preview of a few initiatives coming up in 2012/13, grouped under the strategic theme with which they are most aligned.

#### Theme 1—Create/Expand Services

- Our Housing Program continued to add and upgrade units, with Olympic Vista finishing early in the first quarter, the Queens Manor renovation getting off to a good start in the fourth quarter, and the Swift House expansion completing at year-end.

Our future housing strategies are being charted in a new 6-year housing development plan scheduled for fall 2012 completion.

- Cool Aid's Resources, Education, Employment and Supports program (REES), in partnership with the Umbrella Society, launched the Community Volunteer Training Program, a wonderful successor to the now retired Mentor Training Program.
- The Downtown Community Centre (DCC) is now open evenings and weekends, offering a fantastic assortment of no and low-cost programs to downtown residents, both housed and homeless.
- The Community Health Centre is applying its inner-city health expertise to two new multiagency initiatives—the STOP HIV/AIDS Collaborative and the Palliative Care Resource Team.

## Theme 2—Improve Operational Effectiveness

- Our Shelter Program provided more than 62,500 bed nights and 110,800 meals to 1,552 unique clients and helped 175 of them obtain housing.
- We welcomed an additional 1,151 new patients to the Access Health Centre and delivered more than 34,750 primary health and dental care appointments.
- To address long waits for dental appointments, the dental clinic began opening Saturdays at the beginning of the fourth quarter.
- The agency's successful migration to a new payroll/scheduling/HR system has eliminated many hours of manual effort, reduced paperwork, and made timely information more accessible.

## Theme 3—Strengthen Stakeholder Engagement

- We launched our second Funder and Partner survey, seeking feedback from 120 individuals at more than 60 agencies.
- The 2010 Great Place to Work employee survey results were the springboard for an extensive series of discussions with staff throughout 2011/12 and the impetus for a number of organizational changes.

We're looking forward to participating in the 2012 survey, which will help us identify where we've improved and where we still have work to do.

- Board members and managers initiated the first three sessions of the Client Voice in Governance initiative, which aims to better integrate client feedback into strategic visioning.
- We continued to work closely with the Greater Victoria Coalition to End Homelessness, collaborating on a number of initiatives including Centralized Access to Supported Housing and the Housing Procurement Action Plan.

These highlights and others are elaborated upon in this report through the lens of the 20 strategic objectives, with associated performance measures, which comprise our four balanced scorecard perspectives.

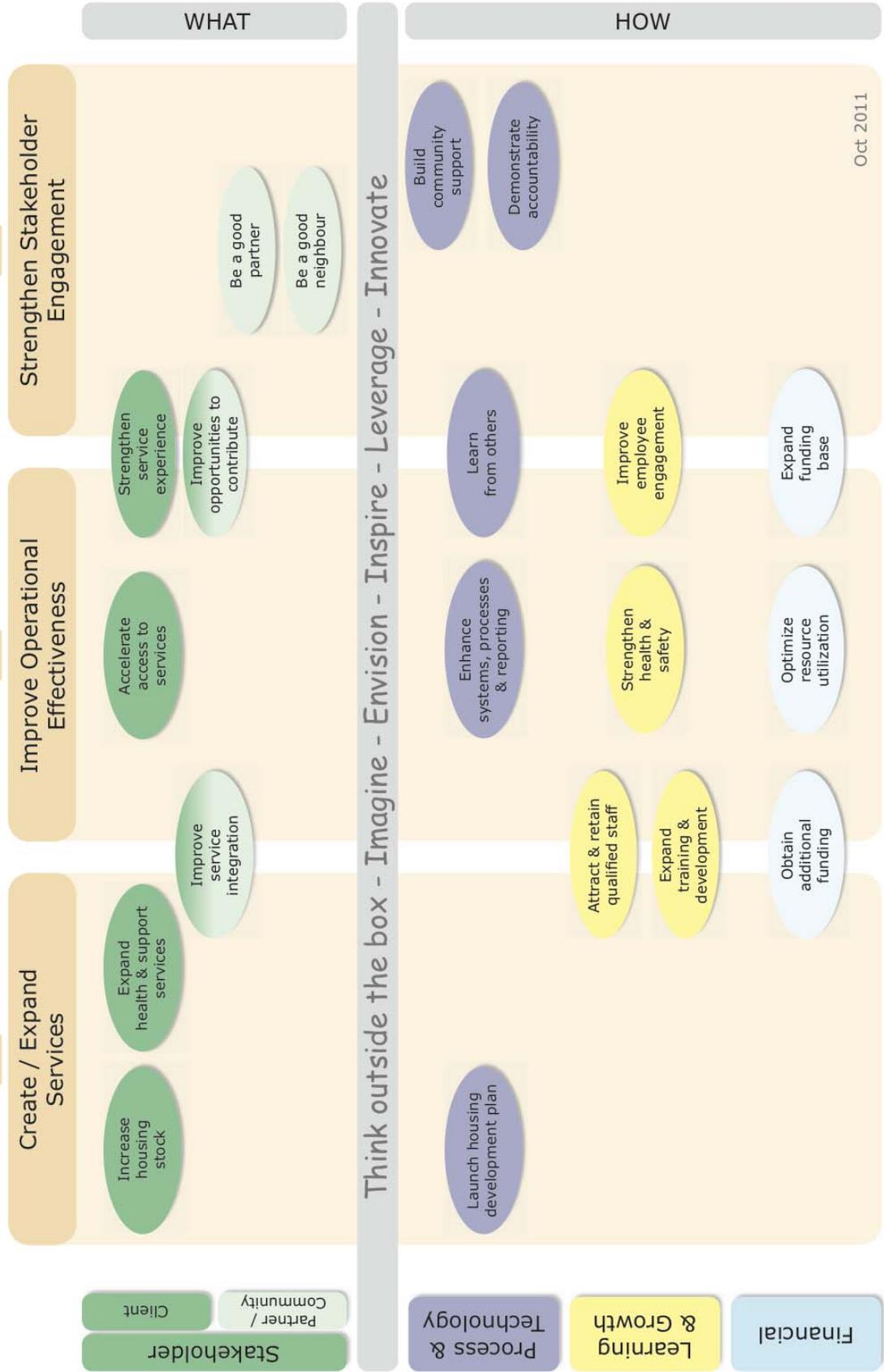
The **strategy map** on the next page illustrates the key components—prime objective, themes, perspectives, strategic objectives—of Cool Aid's three-year strategic plan (2011/12 to 2013/14). The two-page **dashboard** that follows the map is a snapshot of measure-based performance against targets.

Cool Aid is a **learning** organization and, as this report will show, fiscal 2011/12 was a fertile year for learning for all of us, learning that begins with **listening** to our stakeholders—clients, staff, funders, donors, neighbours, and other community organizations—and translates into **action** that incorporates the insights gained.

It is this ongoing translation of what we hear and learn into new and better services, new and better processes, that allows Cool Aid to remain both vibrant and relevant and to keep improving.

I hope you enjoy reading this report.

In partnership with others, Cool Aid will end homelessness in Greater Victoria by 2018 while improving client quality of life



Oct 2011

	baseline	2011/12 performance	2011/12 targets	2012/13 targets	2013/14 targets
<b>Prime Objective</b>					
<b>1-End homelessness in Greater Victoria by 2018</b>	(2010/11)				
Number of unique shelter clients decreases over time	1,550	⬡	↓	↓	↓
<b>Stakeholder Perspective</b>					
<b>1-Increase housing stock</b>					
New housing units opened	—	✓	36	{3}	{3}
New housing units in development	—	✓	59	{3}	{3}
<b>2-Expand health &amp; support services</b>					
Increased hours of service at dental clinic	35 hrs/wk	✓	39	39	39
<b>3-Improve service integration</b>					
Measures & targets being developed	—	—	—	—	—
<b>4-Accelerate access to services</b>					
Decreased dental waitlist time for current patients	> 6 months	✓	< 6 months	< 4 months	3 months
More shelter clients transition to sustainable housing	154 clients	✓	↑	↑	↑
More shelter clients work with CSWs	—	●	—	↑	↑
More tenants move to market housing	—	●	—	↑	↑
Shorter turnover time on housing units	—	●	—	↓	↓
<b>5-Strengthen service experience</b>					
Improved consistency & quality of staff-client interactions					
Community Health Services	4.74 AR5 2010	{2}	—	4.7 AR5	—
Housing Program	—	—	—	> 75%	> 75%
Shelter Program	*	✓	75%	> 75%	> 75%
More client education on chronic disease management	—	—	—	HIV support group	—
<b>6-Improve opportunities to contribute</b>					
Increased opportunities for client-board interaction	—	⬡	3 events	3 events	3 events
<b>7-Be a good partner</b>					
Community/partner initiatives advanced by VCAS support	3 initiatives	✓	3	3	3
Stakeholder satisfaction with partnering & collaboration	3.00 AR4 2009	✓	> 3.00 AR4	—	> 3.35 AR4
<b>8-Be a good neighbour</b>					
Satisfaction ratings by neighbours	—	—	—	↑	↑
<b>Process &amp; Technology Perspective</b>					
<b>1-Launch housing development plan</b>					
Progress made on housing development plan (HDP)	—	⬡	create HDP	launch HDP	—
New developments being pursued	3	✓	3	3	3
<b>2-Enhance systems, processes &amp; reporting</b>					
Improved ability to track clients thru housing continuum	—	⬡	create pilot	implement pilot	—
<b>3-Learn from others</b>					
Stakeholder perceptions of our openness to learning					
Funder & partner perceptions	2.50 AR4 2009	✓	> 2.50 AR4	—	> 3.23 AR4
Client perceptions	—	—	—	↑	↑
<b>4-Build community support</b>					
Maintain number of success stories communicated	—	✓	30	30	30
Sustained growth in number of new legacy expectancies	*	✓	8-10	8-10	8-10
Growth in number of donors	*	✓	520	570	625

	baseline	2011/12 performance	2011/12 targets	2012/13 targets	2013/14 targets
<b>Process &amp; Technology Perspective (cont'd)</b>					
<b>5–Demonstrate accountability</b>					
Audited statements receive unqualified opinion	yes	✓	yes	yes	yes
Auditors report no management issues	no issues	✓	no issues	no issues	no issues
Budget variances are satisfactorily explained	yes	✓	yes	yes	yes
Stakeholder satisfaction with Cool Aid's performance					
Funder & partner satisfaction with overall performance	*	✓	3.63 AR4	—	> 3.63 AR4
Client satisfaction with services received					
Community Health Services	4.7 AR5   2010	{2}	—	4.7 AR5	—
Housing Program	76% HT   2010	✓	75% HT	> 75%	> 75%
Shelter Program	*	✓	80%	> 80%	> 80%
<b>Learning &amp; Growth Perspective</b>					
<b>1–Attract &amp; retain qualified staff</b>					
Internal hire rate is maintained or increases	*	✓	63%	63%	70%
New hires who stay for more than one year	*	✓	75%	75%	80%
<b>2–Expand training &amp; development</b>					
Satisfaction with training & development opportunities	59% PR   2010	{1}	—	70% PR	—
<b>3–Strengthen health &amp; safety</b>					
Staff satisfaction with healthy workplace initiatives	71% PR   2010	{1}	—	77% PR	—
<b>4–Improve employee engagement</b>					
Progress on post-survey implementation plan	—	✓	25% complete	75% complete	complete
Staff satisfaction with recognition initiatives	57% PR   2010	{1}	—	67% PR	—
Improved outcomes on Great Place to Work survey	64% PR   2010	{1}	—	71% PR	—
<b>Financial Perspective</b>					
<b>1–Obtain additional funding</b>					
Success at raising funds for housing development plan	—	—	—	{3}	{3}
Successful wrap-up of Access capital plan	—	✓	\$200,000	\$200,000	\$147,000
Success in attracting grants & sponsorships	—	✓	\$350,000	\$350,000	\$350,000
<b>2–Expand funding base</b>					
	(2010/11)				
Growth in direct mail proceeds	\$32,906	◇	\$59,000	\$65,000	\$72,000
Growth in online donations	\$23,396	✓	\$30,000	\$37,000	\$44,000
Contributions to endowment fund	\$10,568	✓	\$10,000	\$20,000	\$25,000
Total dollars from implementing fund development plan	—	✓	\$811,000	\$837,000	\$807,000
<b>3–Optimize resource utilization</b>					
	(2010/11)				
Supportive housing vacancy rate within target range	1.7%	✗	< 2.6%	< 2.6%	< 2.6%
Assisted living vacancy rate within target range	11.0%	✗	< 4.5%	< 4.5%	< 4.5%

**Abbreviations**

- AR4 Average rating on 4-point scale, where maximum (4) = Excellent.
- AR5 Average rating on 5-point scale, where maximum (5) = Very Good.
- HT Hillside Terrace, VIHA Assisted Living Tenant Survey results.
- PR Positive Response: % of staff choosing 4 or 5 ("often true" or "almost always true") on Great Place to Work survey questions.

**Notes**

- \* Baseline established as 2011/12 target.
- {1} Bi-annual measure. Baseline is performance in 2010 Great Place to Work survey.
- {2} Bi-annual measure. Baseline is performance in 2010 Community Health Centre client satisfaction survey.
- {3} Targets to be established upon completion of Cool Aid's 6-year housing development plan.

## Prime Objective

**In partnership with others, Cool Aid will end homelessness in Greater Victoria by 2018 while improving client quality of life.**

### Strategic Objectives

1—End homelessness in Greater Victoria by 2018

### About the Prime Objective

*Cool Aid’s refreshed prime objective may look similar to that of previous years. It has, however, been transformed from being a largely descriptive statement (“work to eliminate homelessness”) into a genuine **overarching objective**, with an **end date**, that is closely **aligned** with the mandate of the Greater Victoria **Coalition to End Homelessness**. The change—from descriptive to imperative—is significant because our prime objective is now the lens through which our strategic plan is viewed.*

Objective 1	End homelessness in Greater Victoria by 2018	Prime
-------------	--	-------

### Performance Measure Synopsis

◆ Our measure rated a Caution because the number of unique shelter clients did not decrease but remained virtually unchanged between 2010/11 and 2011/12.

Performance by Measure	2011/12
Number of unique shelter clients decreases over time	◆

### Discussion

Despite the introduction of new supportive housing (by Cool Aid and other agencies) in the Greater Victoria region, the number of individuals accessing emergency shelter services has not yet decreased.

	2010/11	2011/12
<b>Number of Unique Shelter Clients</b>	<b>1,550*</b>	<b>1,552</b>

The number of unique shelter clients is only one indicator of the scope of homelessness but other available indicators tell a similar story. A few examples from Rock Bay Landing, the region’s largest shelter (84 beds):

\* Estimated. There are some gaps in our 2010/11 data, largely attributable to the transition to different software to capture shelter client data.

- Shelter occupancy rates continue to hover at or above 100% capacity, which limits our ability to respond to emergency situations.
- In response to 100% bed occupancy situations, a 40-mat program was implemented in 2011/12.
- There were 3,284 instances of 3 pm turnaway in 2011/12.  
(3 pm turnaway defined—Individuals for whom no shelter bed was available in the morning, who returned at 3 pm and still could not be assigned a bed.)

### Thinking Ahead

A number of initiatives are underway or planned that, collectively, are expected to have a measurable impact on the number of people who are homeless or at risk of becoming homeless.

Some of these initiatives are by Cool Aid, several are under the umbrella of the Greater Victoria Coalition to End Homelessness, of which Cool Aid is an active member (see Stakeholder Objectives 1 and 3; Process & Technology Objective 1).

<b>Stakeholder Perspective</b>	<b>What</b>
--------------------------------	-------------

**About This Perspective**

*Cool Aid’s eight Stakeholder objectives identify **what** we need to do, between 2011/12 and 2013/14, in order to be on the right path to meeting our prime objective of ending homelessness in Greater Victoria by 2018.*

*As the elaboration of our prime objective, the Stakeholder Perspective incorporates not only client-focused objectives but also objectives that speak to “working in partnership with others.”*

**Strategic Objectives**

- 1—Increase housing stock
- 2—Expand health & support services
- 3—Improve service integration
- 4—Accelerate access to services
- 5—Strengthen service experience
- 6—Improve opportunities to contribute
- 7—Be a good partner
- 8—Be a good neighbour

Objective 1	Increase housing stock	Stakeholder
-------------	------------------------	-------------

**Performance Measure Synopsis**

During 2011/12, 59 units at three sites were in development, of which 36 opened during the fiscal year.

Performance by Measure	2011/12
New housing units opened	✓
New housing units in development	✓

**Highlights for this Objective**

**Queens Manor**

September 2011—Long-term operating funds were approved, making it possible to finalize staffing.

February 2012—Badly needed major renovations to this former Traveller’s Inn began. Anticipated completion: October 2012.

**Olympic Vista**

May 2011—36 units opened to seniors who were homeless or referred by agencies that provide support to this population.

**Swift House Expansion**

April 2012—Number of units increased from 26 to 49. See adjacent profile.

**Profile—Swift House Expansion**

As Cool Aid’s first housing endeavour, Swift House holds a special place in our housing portfolio. From its beginnings in 1991, tenants had a strong voice in building their community. “In fact, the very foundations of our Housing Program are derived from their input and contributions,” according to our Manager of Housing.

The expansion of Swift House became possible when the former Streetlink shelter closed. In the space vacated by the shelter and by the Community Health Centre, 23 additional apartments and a social gathering space have been created.

With a total of 49 units, Swift House is now Cool Aid’s largest apartment building. The official opening was June 12, 2012.

Objective 2	Expand health & support services	Stakeholder
-------------	----------------------------------	-------------

**Performance Measure Synopsis**

Summer 2011—Hygiene hours at Cool Aid’s dental clinic expanded from 21 to 28 hours weekly.

January 2012—The dental clinic extended its operating hours to include Saturday mornings. The extra four hours per week make it possible to treat an additional four clients weekly.

Performance by Measure	2011/12
Increased hours of service at dental clinic	✓

**Highlights for this Objective**

**Health Care Outreach**

Outreach encounters increased by 34% in 2011/12. That increase includes on-site medical care for clients at 4 Cool Aid shelter and housing locations. See profile below.

**Health Care Outreach**

“Often seeing clients in the community helps to facilitate accessing services at the health centre with the continued philosophy of meeting patients where they are at.”

from Q2 2011/12 Community Health Services Report to the Board

**Health Education at Rock Bay Landing (RBL)**

March 2012—One of RBL’s client services workers began a biweekly “health forum” where he presents information on such topics as hepatitis C and staying healthy on the street. The sessions include a group discussion and time for one-on-one questions.

AIDS Vancouver Island volunteers from their Peer Support Program came to RBL monthly to set up an information table with pamphlets and answer questions.

**Profile—Running for Women**

November 2011—REES’s popular Every Step Counts walking/running program expanded to offer a women-only group operating out of Cool Aid’s women’s shelter, Sandy Merriman House.

This pilot initiative was developed to fill a gap for marginalized women who are more comfortable in a women-only environment.

The response from participants has been extremely positive.

**Running for Women**

Our women’s shelter gained its own women-only walking/running program. See adjacent profile.

**Downtown Community Centre Expansion**

Operating hours increased from 25 to 50 hours weekly, with 12 new programs being offered. The number of program participants more than doubled. See profile below.

**Profile—Downtown Community Centre Expansion**

**Programming**

Effective June 2011, the Downtown Community Centre doubled its operating hours, extending programming into evenings and Saturdays when few services are available to downtown residents.

**Program Participation**

October to December 2011—The Centre welcomed 3,609 participants during this quarter, more than double the number in the same quarter in 2010 (1,500).

**Referrals**

Increased operating hours and another staff person have also increased the Centre’s capacity to connect clients with a variety of community resources.

**Profile—Health Care Outreach**

**Rock Bay Landing**

In response to shelter client feedback, a doctor from Cool Aid’s medical clinic now visits RBL weekly for 3 hours, which complements the half-day per week nurse clinic.

**Sandy Merriman House**

To ensure continuity of care from week to week, the Community Health Centre started a one-hour nurse clinic every Monday.

**Queens Manor**

A Cool Aid nurse started making weekly visits to tenants.

**Other Outreach**

Cool Aid medical professionals also provide outreach care to Pacifica Housing tenants, Victoria Native Friendship Centre clients, and the street population, often working in collaboration with other agencies like VIHA, AVI, VARCS, and PEERS.

Objective 3	Improve service integration		Stakeholder
-------------	-----------------------------	--	-------------

**Performance Measure Synopsis**

An assessment of performance is not possible at this time because no viable measures have yet been identified. Developing meaningful *quantifiable* measures for progress on service integration has proved to be quite challenging and is a work in progress.

Performance by Measure	2011/12
(measures & targets being developed)	—

**Highlights for this Objective**

**Streets to Homes Pilot Project**

The evaluation report, released by the Greater Victoria Coalition to End Homelessness in December 2011, unambiguously demonstrated the effectiveness of this multi-partner initiative in connecting people with sustainable housing. Cool Aid was one of the key partners in the pilot.

Streets to Homes transitioned from pilot to full-fledged program in February 2012, under the management of Pacifica Housing.

**Streets to Homes Pilot Evaluation**

“The report also reveals the innovation and creativity required to make a project like this a truly unique, local solution to a pressing community issue.

“To date, 84 people have been housed: 73 in private market units, 2 in transitional housing, and 7 in supportive housing.”

from Executive Director’s Report to the Board, Jan. 2012

**CASH—Centralized Access to Supported Housing**

Learnings from Streets to Homes and two previous housing registry initiatives contributed to the rapid development and implementation of this new Coalition initiative for a community-based tenant intake process. By March 2012, CASH was already accepting referrals from partner agencies, including Cool Aid.

**STOP HIV/AIDS Collaborative**

Cool Aid’s Community Health Centre hired a research nurse to monitor all HIV clients to ensure lab tests are up-to-date and best practices documented. This will enhance the Centre’s work with the multiagency STOP HIV/AIDS Collaborative. See adjacent profile.

**Profile—STOP HIV/AIDS Collaborative**

STOP HIV/AIDS, short for *Seek and Treat for Optimal Prevention of HIV/AIDS*, is a treatment strategy pioneered and modeled in BC that is being adopted by many countries.

Research indicates that expanded access to HAART (highly active antiretroviral therapy) could have a significant impact on reducing HIV transmission while also reducing HIV/AIDS-related mortality.

Despite advances in HIV treatment, individuals with multiple challenges such as addictions, mental health issues and homelessness face barriers to accessing treatment.

The STOP HIV/AIDS project, spearheaded by the BC Centre for Excellence, is intended to expand access to treatment to hard-to-reach and vulnerable populations.

During 2011/12, *Victoria’s STOP HIV/AIDS Collaborative*, consisting of Cool Aid staff, Assertive Community Treatment Team staff, and the Street Nursing Program, solidified their partnership.

Approximately 250 HIV-positive patients are registered at the Access Health Centre, about 40 of whom are not regularly engaged in the management of their HIV or are otherwise lost to care. These 40 lost-to-care patients are a focus for the Collaborative.

**Palliative Care Resource Team**

An integrated team of community partners is now in place to provide end-of-life care to clients affected by drug addiction, mental health issues, chronic homelessness, and HIV and/or hepatitis C.

The team includes a Community Health Centre doctor and nurse, professionals from VARCS, AVI, VNFC, University of Victoria, and Reverend Al Tysick.

Objective 4	Accelerate access to services	Stakeholder
-------------	-------------------------------	-------------

**Performance Measure Synopsis**

The dental clinic reduced waitlist time from 6+ months at the beginning of 2011/12 to 4.5 months at year-end.

175 shelter clients moved into sustainable housing, compared with 154 clients in 2010/11, a 14% increase.

Due to data limitations (see below), performance cannot currently be assessed for 3 of the 5 measures under this objective.

Performance by Measure	2011/12
Decreased dental waitlist time for current patients	✓
More shelter clients transition to sustainable housing	✓
More shelter clients work with CSWs	●
More tenants move to market housing	●
Shorter turnover time on housing units	●

**Highlights for this Objective**

**Community Kitchen Program (CKP)**

As originally conceived, the 6-week CKP had a growing waitlist and could not keep up with demand. By reconfiguring the program to run 4 weeks, the Downtown Community Centre was able to reduce wait time for clients and offer the CKP more often.

**Emergency Beds for Women**

Sandy Merriman House now has 5 extra beds that will enable staff to respond to emergency situations when the shelter is full, bringing its maximum capacity up to 30 beds. See adjacent profile.

**Profile—Emergency Beds for Women**

Under the 2011/12 Extreme Weather Protocol (EWP), Sandy Merriman House (SMH) offered 5 seasonal beds over and above their normal 25-bed capacity.

On days when EWP was not in effect, the seasonal beds accommodated women from Rock Bay Landing when that shelter was full.

As EWP wrapped up for the year, SMH staff decided to keep the extra beds available for emergencies, for example, when the police bring in someone fleeing an abusive situation and SMH is full.

**Measures without Performance Assessments**

A variety of data challenges currently hamper our ability to monitor progress and performance for this objective. In several cases, scanty or non-existent historical data makes it difficult to set meaningful targets.

Following are a few examples of what we *can* say about these measures in 2011/12:

**Client Services Workers (CSWs) & Shelter Clients**

Much valuable data exists on how CSWs are working with individual shelter clients. However, the *number* of shelter clients who are working with CSWs cannot easily be determined at this time.

**Tenants Move to Market Housing**

At least 20 Cool Aid tenants moved into market housing during 2011/12. It should be noted, however, that one-third (35%) of these moves were precipitated by formal eviction, a request to leave or, in one case, abandonment of the rental suite.

**Turnover Time on Housing Units**

At the time of writing, we were attempting to amalgamate data from two disparate systems in order to preserve valuable historical data.

**Data Challenges**

Of all our objectives, Stakeholder Objective 4 places the greatest demands on our data resources.

It also reveals weaknesses in our data collection processes that will need to be addressed.

Refer to Process & Technology Objective 2 for a fuller discussion.

Objective 5 **Strengthen service experience** Stakeholder

**Performance Measure Synopsis**

Overall, clients at Rock Bay Landing and Sandy Merriman House gave positive ratings to survey questions on staff-client interactions.

In 2012/13, ratings for staff-client interactions for all program areas—Shelters, Housing, Community Health Services—will be available.

Performance by Measure	2011/12
Improved consistency & quality of staff-client interactions:	
Community Health Services	B
Housing Program	—
Shelter Program	✓
More client education on chronic disease management	—

**Highlights for this Objective**

**Staff-Client Interactions**

—Sandy Merriman House (SMH)

Since 2009/10, when SMH started its client satisfaction survey, client ratings have shown steady gains.

In 2011/12, 90% of SMH clients responded positively to questions on staff-client interactions (78% in 2009/10).

One question is notable for its relatively low rating: only 69% of respondents agreed that they were told how to make a formal complaint. See adjacent table.

Indicators of Staff-Client Interactions Shelter Client Satisfaction Survey	Sandy Merriman House			Rock Bay Landing
	2009/10	2010/11	2011/12	2011/12 (Q4 only)
<i>% Who Agree or Strongly Agree</i>				
<b>Average for These Questions</b>	<b>78%</b>	<b>84%</b>	<b>90%</b>	<b>75%</b>
I feel welcomed at this shelter	90%	94%	99%	85%
I feel safe at this shelter	78%	81%	89%	75%
I feel that staff listen and respond to my complaints or concerns	71%	90%	93%	73%
I am treated fairly	75%	94%	95%	83%
Shelter rules were explained clearly to me	90%	81%	91%	85%
I was told how to make a formal complaint	63%	68%	69%	42%
The staff provides me with information on the services I need	79%	84%	95%	76%
Number of respondents	58	31	48	59

**Staff-Client Interactions**

—Rock Bay Landing (RBL)

75% of RBL clients gave a positive response to questions on staff-client interactions.

Like SMH, RBL respondents also gave their lowest rating to the question on whether they were told how to make a formal complaint, with only 42% agreeing. See table above.

**Staff-Client Guidelines**

—Rock Bay Landing (RBL)

To clarify and improve consistency, RBL staff and clients designed a revised Suspension of Services guide and appeal policy.

**Funders and Partners on Client Service Experience**

In our 2012 survey, almost all respondents gave Cool Aid a Good or Excellent rating for each of 3 client service experience attributes.

Theme—Client Service Experience 2012 Funder & Partner Survey	Good or Excellent	n=
<b>Theme Overall</b>	<b>97%</b>	36
Cool Aid makes a positive difference in client quality of life	98%	47
Clients are treated with fairness, dignity and respect	96%	47
Clients are satisfied with the quality of services provided	97%	34

Objective 6	Improve opportunities to contribute	Stakeholder
-------------	-------------------------------------	-------------

**Performance Measure Synopsis**

◆ Our measure earned a Caution because, of the 3 Client Voice sessions targeted for 2011/12, only 2 took place by year-end.

Performance by Measure	2011/12
Increased opportunities for client-board interaction	◆

**Highlights for this Objective**

*Client Contributions*

**Client Voice in Governance**

By the time of writing, 3 Client Voice sessions had taken place: Shelters (January), Health Services (March), and Housing (May). See adjacent profile.

**Poetry Rocks at Rock Bay Landing**

During 2011/12, participants in Poetry Rocks, a new client group at RBL, began sharing their poems at various community venues. In February 2012, a collection of this unique visceral poetry was published in *Voices from the Edge*, a book by poets from both RBL and PEERS Victoria Resource Society.

**Program Graduates Give Back**

At the Downtown Community Centre, Community Kitchen Program graduates have been provided opportunities to “give back” by helping make and serve tenant BBQs and Christmas baking.

**Olympic Vista**

At our newest building, 4 tenants have become active volunteers, helping out in the kitchen with meal preparation, tending the vegetable garden, and taking on other tasks in and around the building.

*Community Contributions*

**Community Volunteer Training Program (REES)**

28 volunteers from 15 community agencies enrolled in the first round of 8-week training, designed to improve volunteer knowledge, capacity and comfort level in working with vulnerable populations facing multiple challenges. See adjacent profile.

**Downtown Community Centre**

Expanded hours of operation (see Stakeholder Objective 2) have increased the Centre’s capacity for volunteer opportunities. For example, the Community Drum Circle and Yoga Program are facilitated by volunteers.

**Profile—Client Voice in Governance**

After reviewing various models for client participation in governance, Cool Aid’s Board of Directors initiated a small, time-limited Client Participation Working Group in 2011/12, with representation from the Board, management and clients. Their mandate: to establish a framework for engaging clients in setting Cool Aid’s strategic direction.

Initial client consultations indicated that most clients would prefer program-specific sessions to which Board members could bring specific questions or issues for discussion.

Named Client Voice in Governance, the subsequent client-board sessions focused on two Stakeholder objectives:

- Expand health & support services
- Improve opportunities to contribute

Client input from these sessions was captured and is being reviewed by Board and management to determine next steps.

**Profile—Community Volunteer Training Program**

Cool Aid’s REES Program and the Umbrella Society for Addictions and Mental Health are partnering to deliver this new initiative, which builds on the 5-year success of their Mentor Training Program.

Consultations with volunteers, community partners and agency leaders revealed a real gap in the availability of training and education for volunteers working within health and social service agencies.

Starting April 2012, groups of health and social sector volunteers will receive 8 weeks of training. The training will result in increased volunteer confidence, competence and capacity to support people dealing with mental illness, addictions, homelessness, and other challenges.

Objective 7	Be a good partner	Stakeholder
-------------	-------------------	-------------

**Performance Measure Synopsis**

As an active member of the Greater Victoria Coalition to End Homelessness and the Downtown Service Providers, Cool Aid helped advance several community initiatives (see below).

93% of respondents to our 2012 funder and partner survey rated our partnering and collaboration efforts as Good or Excellent. The full report is available on Cool Aid’s website.

Performance by Measure	2011/12
Community/partner initiatives advanced through Cool Aid support	✓
Stakeholder satisfaction with partnering & collaboration	✓

**Highlights for this Objective**

**Greater Victoria Coalition to End Homelessness**

As part of the Coalition, Cool Aid contributed to several key partner initiatives in 2011/12, among them, the [Housing Procurement Action Plan](#) (Housing Working Group), the [Community Plan to End Homelessness](#) (Management Committee), and a business plan (Management Committee).

**Downtown Service Providers (DSP)**

[Non-Beverage Alcohol Dependency Crisis](#)—The DSP (chaired by Cool Aid’s executive director) formed a small task group to review the issue of individuals who are drinking non-beverage alcohol, the services available to them, gaps in services, and areas for improvements. Among the initiatives being explored: a managed alcohol program and a supportive recovery program for individuals returning from treatment whose goal is to maintain sobriety.

**Operating Cost Target Framework for New Projects**

By year-end, this BC Housing task group was close to completing their work on a framework for assessing estimated operating costs on new social housing projects. Cool Aid’s executive director is a member of the task group.

**Greater Victoria Public Library (GVPL)**

Cool Aid and the GVPL strengthened their partnering relationship during 2011/12, and the Downtown Service Providers gained a new member. See sidebar.

[Library While You Wait Program](#)—A new collaboration between Cool Aid’s dental clinic and GVPL reading program now makes waits less tedious for patients. A variety of light reading, much of which can be read in less than an hour, is provided in the waiting room and refreshed every six weeks.

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

Having served her first term as Vancouver Island representative on the BCNPHA Board, Cool Aid’s executive director was re-elected to that position for a second 3-year term. She was also elected to the position of chair.

**Shelter Clients and Library Patrons**

“We were invited to participate in a day-long series of workshops put on by the Greater Victoria Public Library for their staff. We provided some introductory training in ‘Managing Hostile Behaviours’ for 125 of their frontline staff.

“It was a very enlightening experience for us (and hopefully them) learning that our public libraries see themselves as service providers to the same people we consider to be our clients.

“As a result we have made closer connections and invited the GVPL to send representatives to the Downtown Service Providers table.”

from Q2 2011/12 Shelter Program Report to the Board

**Award for Collaboration and Partnership**

Cool Aid’s executive director was the recipient of the United Way of Greater Victoria Award for Collaboration and Partnership, a new category in the annual Victoria Leadership Awards.

Objective 8	Be a good neighbour		Stakeholder
-------------	---------------------	--	-------------

### Performance Measure Synopsis

In 2011/12, Cool Aid’s good neighbour efforts were most concentrated in the neighbourhoods around Rock Bay Landing (Shelter Program) and Queens Manor (Housing Program).

Have we done a good job? We believe we have but will be asking our neighbours directly through surveys at both sites in 2012/13 and 2013/14.

Performance by Measure	2011/12
Satisfaction ratings by neighbours	—

### Highlights for this Objective

#### Queens Manor Neighbourhood

As a result of concerted efforts to create a sense of community within Queens Manor and to respond to neighbours’ concerns, we believe that the Manor is now considered by many to be an integral part of the social landscape. See profile below.

#### Invested in the Neighbourhood

Queens Manor—“Through regular meetings, folks began to understand Cool Aid’s role more clearly. They began to trust that our staff were committed to increased neighbourhood safety, that we would respond quickly to their concerns, and that we were invested in the health of the community.”

from Manager of Housing, 2011/12 Annual Report

#### Rock Bay Landing Neighbourhood

Spring 2011—Monthly meetings of the Neighbourhood Liaison Committee began.

Fall 2011—Frequency of committee meetings changed from monthly to quarterly by mutual agreement because “things are going quite well.”

November 2011—Rock Bay Landing celebrated its first anniversary with a community BBQ featuring readings from Poetry Rocks participants (see Stakeholder Objective 6), live music by residents and staff, and tours of the shelter.

#### Recognition from a Neighbour

Rock Bay Landing—“We received a lovely note from the United Church thanking our client-driven [Clean and Safe Team](#) for doing such a great job keeping the neighbourhood looking so good.”

from Q4 2011/12 Shelter Program Report to the Board

### Profile—Queens Manor (QM)

#### Background

- Former Traveller’s Inn located at 710 Queens, purchased by the City of Victoria.
- Opened as supportive housing under Cool Aid management in November 2010.
- 36 units for high-needs individuals dealing with a variety of substance use and/or mental illness challenges.
- Original tenants included many of the individuals who were camping on the Pandora Avenue median or had been homeless for an extended time.

#### The Good Neighbour Process

Q1 2011/12—Under the guidance of the City of Victoria, Cool Aid participated in a series of meetings with neighbours and other stakeholders. QM tenants continue to be connected with a variety of external resources.

Q2 2011/12—Monthly neighbourhood meetings taking place at various locations with the theme “Calming the Neighbourhood.” Police calls being reviewed monthly with Community Resource Officers.

Q3 2011/12—Monthly neighbourhood meetings now being hosted at Queens Manor.

Q3 2011/12—Every morning before 9:00 am, Cool Aid staff or QM tenants look for and pick up any refuse surrounding the building. Three times a week, trained tenants use a cleanup cart (provided by the City of Victoria) to clean refuse within three city blocks of Queens Manor.

#### Year-End Status

Q4 2011/12—Refuse clean-up schedule being maintained. Neighbourhood meetings continue to be hosted by Cool Aid at Queens Manor and facilitated by City of Victoria staff.

The meetings have now been adjusted from monthly to quarterly as the relationship with surrounding businesses has improved.

2012/13  
& Beyond

## Thinking Ahead

Stakeholder

### Areas for Improvement

Improve service integration

- Develop quantitative performance measures and targets for Stakeholder Objective 3.

Accelerate access to services

- Strengthen client-related data resources (see Process & Technology Objective 2).
- Develop targets for all performance measures under Stakeholder Objective 4.

### New and Expanded Client Services

- Contribute to the multiagency task group examining the feasibility and suitability of a **managed alcohol** program in Victoria.
- Introduce an **HIV peer support group** at the Community Health Centre, building on the experience and success of the client-facilitated hepatitis C support group.
- Develop new **recreation programming** for tenants at Hillside Terrace, Olympic Vista and Swift House.

### Accelerated Access to Services

- Launch a second client-facilitated **hepatitis C support group** to accommodate individuals on the waitlist (Q3 2012/13).

### Strengthened Service Experience

- Expand our knowledge on how to provide **culturally competent care** and **trauma-informed care** to Community Health Centre clients, by participating in a 5-year, cross-Canada health equity study. See sidebar.
- Cultivate expertise in providing **culturally sensitive shelter services** and space to gay, bi-sexual, and transgendered people.

#### Health Equity Research Project

In 2011/12, the CHC became a research site and collaborator on a major project led by UBC Nursing faculty, entitled "Equity-oriented Primary Health Care Interventions for Marginalized Populations: Addressing Structural Inequities and Structural Violence."

### Community & Partner Initiatives

- Collaborate with community partners to increase **food security** for those in need (through the Coalition, the Downtown Service Providers, the Give Food Get Food initiative, and other platforms).
- Endorse and participate with partners in implementing measures to combat **poverty**, for example, the Community Action Plan on Poverty initiated by the Community Social Planning Council.

<h2>Process &amp; Technology Perspective</h2>	<b>How</b>
---	------------

### About This Perspective

*The focus of this perspective is the internal processes and tools that we need to put in place, improve, or excel at, in order to meet our Stakeholder objectives.*

### Strategic Objectives

- 1—Launch housing development plan
- 2—Enhance systems, processes & reporting
- 3—Learn from others
- 4—Build community support
- 5—Demonstrate accountability

Objective 1	<b>Launch housing development plan</b>	<b>Process &amp; Technology</b>
-------------	--	---------------------------------

### Performance Measure Synopsis

◆ Our original target—to create a housing development plan by March 2012—was not met, hence the Caution.

Contributing factors: a later than anticipated release date of the Coalition’s Housing Procurement Action Plan; resources diverted to respond to unanticipated opportunities for new housing developments.

Performance by Measure	2011/12
Progress made on housing development plan (HDP)	◆
New developments being pursued	✓

### Highlights for this Objective

#### Housing Development Plan (HDP)

Aligned with the Coalition’s plan, Cool Aid’s HDP will guide our housing development endeavours through to 2018. See adjacent profile.

An HDP working group began outlining the parameters of Cool Aid’s 6-year plan in March 2012. Anticipated completion date: Fall 2012.

#### New Developments Being Pursued

Cool Aid is currently actively pursuing three potential housing projects. Several others are at the concept stage.

### Profile—Cool Aid’s Housing Development Plan

#### Coalition Housing Targets

In its March 2012 Housing Procurement Action Plan, the Coalition to End Homelessness set a target of 964 new housing units by 2018 for the region’s homeless and at-risk.

Of the targeted units, 245 are rent-supplemented; 719 are new construction or renovated or repurposed units.

#### Alignment with Coalition

As a fully committed Coalition partner since 2008, Cool Aid will create a housing development plan that aligns with Coalition’s Housing Procurement Action Plan as well as its Community Plan to End Homelessness.

#### HDP Working Group

This internal working group includes Cool Aid management and a Board member. The working group will determine how many of the 719 units to adopt as Cool Aid’s 2018 target and identify specific strategies and initiatives required to achieve that target.

Objective 2	Enhance systems, processes & reporting	Process & Technology
-------------	--	----------------------

**Performance Measure Synopsis**

◆ In retrospect, our 2011/12 target—to design a pilot project for technology-enabled data integration between Housing and Shelter programs—was overly ambitious. It was also probably premature in view of the data challenges (see below) revealed since the target was set.

Performance by Measure	2011/12
Improved ability to track movement through housing continuum	◆

**Highlights for this Objective**

**Data Challenges**

To determine whether we are making a difference—and how much of a difference—we need better data about our Shelter and Housing clients than is currently available. Moreover, in order to be able to “track clients through the housing continuum,” at least *Cool Aid’s* housing continuum, some minimum level of data integration between the two programs is essential. See profile below.

**New Payroll/Scheduling/HR System**

January 2012—After a successful migration from our former system and extensive training, we went live, on schedule, with our Quadrant Workforce application. By fiscal year-end, staff throughout the agency were seeing real benefits. See sidebar.

**New Payroll/Scheduling/HR System  
— Some of the Benefits Seen by Year-End**

- New hires—Improved processing & communication between human resources, payroll, program schedulers and coordinators.
- Seniority lists—Instead of hours of manual effort, up-to-date lists now generated on demand.
- Retroactive pay—Email and system alerts provide notifications of entitlement to managers, eliminating the need for manual tracking. Processing time has been greatly reduced.
- Sick & attendance—Up-to-date reports available to managers on demand.
- Contact info—Payroll/HR paperwork reduced by providing staff access to Web self-service to update their own address and contact details.
- Criminal record checks—Renewal dates now tracked in the system, ensuring compliance with requirements.
- Probationary reviews—Notifications and reminders issued to supervisors well in advance.

**New Property Management System**

July 2011—We began using a web-based application, replacing an Excel- and paper-based system that had become unwieldy. Benefits include improved monitoring of outstanding rent payments, significant reductions in administrative time and effort, and easier access to reports.

**Quarterly Reporting Enhancements**

Q2 2011/12—Senior managers began using a new template, closely aligned to our refreshed strategic plan, for their quarterly reports to the Board.

**Profile—Data Challenges**

How many Housing tenants move on to market housing? How many tenants need more—or less—support from year to year? Are we helping more Shelter clients obtain and retain sustainable housing? These are questions we should be able to answer easily but, at present, cannot.

It was in the course of assessing progress on Stakeholder Objective 4 that a number of data shortcomings really came into focus, among them:

- Valuable client information not captured electronically
- Data standardization issues

- Data quality issues
- Duplicate data capture
- Data collection processes that are unsustainable over the long term (require too much time or effort)
- Insufficient or incompatible historical data available for analysis and target-setting
- Shelter and Housing client data resides in several different systems with no mechanism for data integration.

See [Thinking Ahead](#).

Objective 3 Learn from others Process & Technology

**Performance Measure Synopsis**

88% of respondents to our 2012 funder and partner survey rated Cool Aid Good or Excellent on learning from others—a quite respectable showing.

However, compared to the other 4 survey themes (see Process & Technology Objective 5), the **Learning from Others** theme earned the lowest proportion of *Excellent* ratings (35% of respondents vs. 65% for **Organizational Leadership** and 57% for **Partnering & Collaboration**).

**Highlights for this Objective**

The partners and funders who took our 2012 survey inspired us to reflect on *how* we learn and how we *act* on what we learn.

One outcome of these reflections was choosing **Listening, Learning, Action** as the motif for our 2011/12 annual report. Another was an increased awareness of, and appreciation for, the fruits of the learning process.

Performance by Measure	2011/12
Stakeholder perceptions of our openness to learning from them:	
Funder & partner perceptions	✓
Client perceptions	—

Theme—Learning from Others	Good or Excellent	n=
2012 Funder & Partner Survey	<b>88%</b>	40
<b>Theme Overall</b>	<b>88%</b>	40
Receptive to learning from partners and funders	87%	47
Willing to consider alternative viewpoints	87%	45
Makes changes in response to input from stakeholders	87%	38

**A Sampling of Learning Reflections & Experiences in 2011/12**

(see also Learning & Growth Objective 2)

Downtown Community Centre—“Attended Youth Service Providers Network meetings to discuss common challenges in offering programs to **youth** who often do not want structured programs but more drop-in variety where they can learn with peers.” — from Q3 2011/12 DCC report

REES Program—Listening to and learning from clients, partners and others coalesced into two new ventures in 2011/12: the Community **Volunteer Training** Program and a **women-only** Every Step Counts group at Sandy Merriman House (see Stakeholder Objectives 6 & 2).

Community Health Centre—Implemented suggestion from Client Voice meeting to have physician visits at Rock Bay Landing to complement existing nurse and counsellor **outreach** clinics.

Homelessness Action Week—Executive director and 3 Shelter staff attended a learning event hosted by the Community Planning Council and the Coalition. Topic: **Ending poverty** in the region—next steps for a movement, charter and action plan.

Several Housing and Health program staff had the opportunity to visit a **managed alcohol program** in Vancouver, run by the Portland Hotel Society.

Sandy Merriman House—“The ripple effect from examining the issues **transgendered** people face and making our shelters safer physically, spiritually and mentally has been huge.

“Information gathered from the visit was used to inform our participation in a group that is investigating the feasibility and suitability of such a program in our community.” — from Q4 2011/12 Housing Program Report to the Board

“This awareness has not only positively affected clients but has also been a valuable learning experience for many staff.” — from 2011/12 Annual Report

Shelter Program—Adapted (with permission) a **fraternization policy** that has been successfully used by a service provider in Vancouver with a similar working style and client group to Cool Aid’s.

A dozen Cool Aid delegates attended the British Columbia Non-Profit Housing Association **conference** in November. The theme: all aspects of sustainability in the non-profit housing sector.

2010 Great Place to Work survey—Our 2011 refresh of Learning & Growth objectives was strongly influenced by learnings from the survey results and from follow-up discussions with **staff** on strengths and weaknesses.

“Participants had opportunities to learn from others and share their own expertise through a variety of keynote addresses, workshops, social events and networking breaks.” — from Executive Director’s Report to the Board, January 2012

Objective 4	Build community support	Process & Technology
-------------	-------------------------	----------------------

**Performance Measure Synopsis**

At least 16 **success stories** were published in print, broadcast or Web media in the last two quarters of 2011/12 (when tracking began). See profile below.

With 9 new **legacy expectancies** in 2011/12, we exceeded our target (8), even though our legacy campaign had barely begun.

590 unique **donors** made contributions to Cool Aid in 2011/12, well above target (520), a 25% increase over the previous fiscal year.

Performance by Measure	2011/12
Maintain number of success stories communicated	✓
Sustained growth in number of new legacy expectancies	✓
Growth in number of donors	✓

**Highlights for this Objective**

**Communication Plan**

Early 2012—A 3-year strategic communication plan was vetted through the Board’s Community Relations Committee and endorsed by the Board of Directors. A parallel 3-year operational communication plan was being finalized at fiscal year-end; it outlines implementation of the strategic communication plan.

**Profile—Success Stories Communicated**

Between October 18, 2011 and March 31, 2012, the following 7 stories earned the **most media exposure**:

- McGregor Socks donation of 10,000 pairs of socks to Capital Region agencies serving people who are homeless or at risk
- Queens Manor—Pre-renovation tour of the former Traveller’s Inn
- Swiss Natural’s gift of \$50,000 in vitamins to the Community Health Centre
- Rock Bay Landing—The shelter’s first anniversary
- Poetry Rocks—Book launch (see Stakeholder Objective 6)
- Bosa Properties Foundation’s donation for Every Step Counts to be offered at Sandy Merriman House (see Stakeholder Objective 2)
- Every Step Counts—Third anniversary of the popular walking/running program

"Most media exposure" is defined as 5 or more iterations in print, broadcast or Web media; excludes re-tweets.

Objective 5 Demonstrate accountability Process & Technology

**Performance Measure Synopsis**

Cool Aid’s 2011/12 financial audit was completed with no management issues reported. The independent auditors concluded:

“In our opinion, these financial statements present fairly, in all material respects, the financial position of the Society as at March 31, 2012 and the results of its operations and changes in net assets and cash flows for the year then ended in accordance with Canadian generally accepted accounting principles.”

Our financial statements demonstrate that the agency continues to maintain a strong financial position.

Regarding *overall* performance or *overall* satisfaction with services, respondents rated Cool Aid at 85% or higher in 3 out of 4 stakeholder surveys undertaken in 2011/12.

Performance by Measure	2011/12
Audited statements receive unqualified opinion	✓
Auditors report no management issues	✓
Budget variances are satisfactorily explained	✓
Stakeholder satisfaction with Cool Aid's performance:	
Funder & partner satisfaction with performance	✓
Client satisfaction with services received:	
Community Health Services	B
Housing Program	✓
Shelter Program	✓

**Highlights for this Objective**

Here are “snapshots” from four surveys that show some of our stakeholders view Cool Aid’s overall performance.

Overall Satisfaction with Performance 2012 Funder & Partner Survey	% Good or Excellent	n=
Based on your total experience with this agency, how would you rate our overall performance?	100%	56
Survey Themes		
Organizational Leadership	98%	62
Client Advocacy	98%	48
Partnering & Collaboration	93%	58
Client Service Experience	97%	36
Learning from Others	88%	40

Overall Satisfaction with Services  
**Shelter Client Satisfaction Survey**

Overall, I am satisfied with this shelter.

Sandy Merriman House			Rock Bay Landing
% Who Agree or Strongly Agree			
2009/10	2010/11	2011/12	2011/12 (Q4 only)
82%	87%	97%	85%
n= 58	31	48	59

Overall Satisfaction with Services  
**Assisted Living Tenant Survey**

Overall, how satisfied are you with the quality of the hospitality services (meals, housekeeping, recreation, etc.) that you receive in the residence?

Hillside Terrace			
% Satisfied or Very Satisfied			
2009/10	2010/11	2011/12	2012/13
81%	76%	73%	89%
n= 27	18	22	28

2012/13  
& Beyond

## Thinking Ahead

Process &  
Technology

### Areas for Improvement

Enhance systems, processes & reporting

- Address data shortcomings that hamper our ability to monitor and report on progress (especially for Stakeholder Objective 4).
- Determine how to cultivate our capacity to track clients through the housing continuum.
- Systematize how, when and why we undertake client satisfaction surveys (Stakeholder Objective 5, Process & Technology Objective 3).

### Learning from Others

- Undertake a **participant satisfaction survey** for REES programs.
- Initiate a **tenant satisfaction survey** at Pandora Apartments.
- Follow up on issues raised by clients during **Client Voice** meetings (Stakeholder Objective 6).
- Carry out **neighbourhood surveys** for Rock Bay Landing (2012/13) and Queens Manor (2013/14) (Stakeholder Objective 8).
- Participate in the 2012 **Great Place to Work** survey (Learning & Growth Objectives 2-4).

### Building Community Support

- Launch the new 3-year strategic **communication plan**.
- Continue to ramp up the **legacy campaign**.

## Learning & Growth Perspective

How

### About This Perspective

*How do we attract—and keep—the qualified employees essential to achieving our eight Stakeholder objectives? How do we cultivate and sustain a workplace culture that is supportive of both staff and clients? How do we grow the organizational capacity needed to meet our prime objective? These questions are the focus of the Learning & Growth Perspective.*

### Strategic Objectives

- 1—Attract & retain qualified staff
- 2—Expand training & development
- 3—Strengthen health & safety
- 4—Improve employee engagement

### Objective 1 Attract & retain qualified staff

Learning & Growth

#### Performance Measure Synopsis

**Internal hire rate**—Of the 51 positions staffed in 2011/12, 78% (40) were filled by internal candidates, up from 63% the previous year.

**New hire retention**—Within one year, there was a 59% decrease in the rate of resignations with less than one year of service.

Performance by Measure	2011/12
Internal hire rate is maintained or increases	✓
New hires who stay for more than one year	✓

#### Highlights for this Objective

##### Attracting Qualified Staff

June 2011—Cool Aid once again sponsored 3 Camosun College awards for outstanding academic achievement by students in the Community, Family and Child Studies Department.

September 2011—Our HR team participated in Camosun College’s Student Employment Festival, a good opportunity to promote Cool Aid as an employer of choice. In the Resumania event, we and 20 other HR professionals provided feedback to students and alumni on their resumes and conducted mock behavioural interviews.

#### Cool Aid Staff in 2011/12

242 employees (up 8.5%)
74% permanent • 26% casual
61% female • 39% male
Average age—41

Average length of service —permanent staff	5.5 years
--	-----------

##### Retaining Qualified Staff

Q3 2011/12—A new e-claims process was implemented that allows for online submission and reimbursement of employee claims for extended health benefits. Very positive feedback has been received from staff regarding this service.

Q4 2011/12— Self-directed performance reviews were introduced for team leaders. While based on different competencies, the team leader reviews resemble those for unionized employees, which were successfully introduced in 2010/11. Their common purpose: to stimulate discussion, build rapport, and generate feedback and recognition in a structured way.

##### Ongoing Challenges

- Attracting qualified candidates for **overnight positions** continues to be a challenge, especially in the Shelter Program.
- The **retention of casuals** remains a challenge for both Housing and Shelter Programs. See **Thinking Ahead**.

Objective 2	Expand training & development	Learning & Growth
-------------	-------------------------------	-------------------

**Performance Measure Synopsis**

**Mid-cycle update**—In the 2010 Great Place to Work (GPW) survey, questions on training and development (T&D) were among the lowest rated by Cool Aid staff. In follow-up discussions during 2011/12, more T&D was consistently identified as a priority by staff across the organization.

When the results of the next GPW survey are available (early 2013), we anticipate that ratings for T&D questions will have improved because of initiatives undertaken during 2011/12.

Performance by Measure	2011/12
Increased satisfaction with training & development opportunities	B

**Learning & Growth Priorities** identified in staff discussions on [2010 Great Place to Work survey](#)

Training & development
Workplace wellness
Workplace culture
Recognition & appreciation

**Highlights for this Objective**

**Myers Briggs Type Indicator Certification**

Our HR Assistant became certified in Levels 1 and 2. With this in-house expertise, Cool Aid can better support new T&D opportunities, especially for team building and leadership development.

This tool can assist staff to learn about themselves and their values, which is transferable to developing stronger working relationships that include mutual respect, trust, and clearer communication and contributes to constructive problem-solving and conflict resolution within teams.

**Shelters Program—Training Committee**

Q2 2011/12—A Shelters training committee was formed to coordinate and promote T&D for new and current staff in the shelter group and from other departments who work with shelter service delivery points. The committee is focusing on training necessary to support staff, with particular emphasis on self-care, service delivery and professional development.

<b>Training &amp; Development in 2011/12—A Sampling</b>	(see also Process & Technology Objective 3)
---	---

**Hep C & HIV/AIDS**

- Shelters—41 staff attended the 1<sup>st</sup> quarterly training event on HIV/AIDS, hepatitis A, B, C, harm reduction and other topics, organized by the training committee in collaboration with AIDS Vancouver Island.
- Medical Clinic—3 nurses attended a hep C conference in Vancouver to learn more about upcoming new drugs.
- Medical Clinic—In the fall, one of our physicians held 3 lunchtime updates on HIV, attended by clinic staff, AVI staff, methadone doctors and street nurses.

**Mentoring**

- REES—Learnings and best practices from Cool Aid’s Mentoring Program were presented to delegates at the International Mentoring Conference in Albuquerque, New Mexico by the program coordinator.

**Networking**

- Shelters—2 frontline staff attended the Networking Conference. With 100+ community agencies participating annually, it is an opportunity for staff to engage with and learn about other referral resources.

**Mental Health**

- REES—Sponsored 10 clients and volunteers to attend the annual Vancouver Island Schizophrenia Conference.
- Agency-wide—25 employees attended the South Island Training Initiative Society conference. Keynote speaker: Dr. Gabor Mate on Close Encounters with Addictions.

**Wellness**

- Shelters—With the theme of wellness, the training committee’s 2<sup>nd</sup> quarterly 2-day training event included a counsellor who discussed compassion fatigue, Hospice staff who spoke about grief and loss, and practitioners who offered yoga, meditation & acupuncture.

**Trauma-Informed Care**

- Shelters—Several staff attended a webinar on Trauma-Informed Practice.

**Dental Care**

- A certified dental assistant attended the Pacific Dental Conference; she plans to hold 2 “lunch and learn” sessions in the clinic on infection control policy changes and smoking cessation issues.

Objective 3 Strengthen health & safety Learning & Growth

**Performance Measure Synopsis**

**Mid-cycle update**—During staff discussions after the 2010 Great Place to Work survey, critical incident debriefing (see Reportable Incidents sidebar below) emerged as an area of considerable interest. All programs and departments are taking steps to improve the frequency and quality of post-incident debriefings.

We are also examining options for providing more opportunities for health- and safety-related training, another area of interest identified by staff, especially training related to managing or de-escalating potentially aggressive behaviours.

Performance by Measure	2011/12
Increased staff satisfaction with healthy workplace initiatives	B

**Learning & Growth Priorities** identified in staff discussions on 2010 Great Place to Work survey

- Training & development
- Workplace wellness
- Workplace culture
- Recognition & appreciation

**Highlights from 2011/12**

**Critical Incident Debriefing**

Q2 2011/12—Staff from all programs participated in a Critical Incident Group Debriefing workshop, which addressed providing support for others experiencing symptoms of trauma and stress after a critical incident. The facilitator provided information about the impact of critical incidents and how to facilitate a group debriefing in the workplace.

**Occupational Health & Safety Committee Highlights**

**Incident monitoring and reporting**—Greater awareness among program staff of the importance of recording incidents, resulting in improved data capture; numerous improvements to incident report forms, including the introduction of an electronic version with drop-down fields and email submission to supervisors and occupational safety reps; data aggregations simplified; greater emphasis on data interpretation and on policy/procedural responses to incidents.

**Site safety inspections**—More regular and more systematic site safety inspections, thanks to the adoption of an inspection checklist and an inspection schedule.

**Earthquake/emergency preparedness**—Coordinated participation in workshops and seminars; arranged for earthquake kits at all Cool Aid sites; significant progress on the agency-wide manual for emergency preparedness (anticipated completion: fall 2012).

**Claim Submission**

Q4 2011/12—New WorkSafe and disability management efforts dramatically reduced the time from claim submission to payment of wage-loss benefits, which alleviates some of the stress and financial pressures employees experience when off on a work-related injury. This also enables us to work with all parties on better return-to-work planning.

**Reportable Incidents**

**Critical Incident** is an occurrence that has resulted in injury to a worker/client requiring medical treatment and includes incidents of violence in the workplace. May also include experiencing significant trauma at work, such as witnessing a fatality. (See WorkSafe BC form 6A.)

**Incident** is a situation that did not involve injury to a worker/client, or only involved minor injury not requiring medical treatment, but had the *potential* for causing serious injury to a worker/client.

**Property Damage** is an occurrence resulting in loss sustained to material, equipment or property (including harm to the natural environment, such as a spill where damage has occurred).

from Cool Aid Incident Report Form (May 30, 2012 revision)

Objective 4	Improve employee engagement	Learning & Growth
-------------	-----------------------------	-------------------

**Performance Measure Synopsis**

**Post-2010 survey implementation plan**—By year-end, about 35% of the plan had been implemented, with completion anticipated by the end of 2013.

**Mid-cycle update**—A number of employee recognition initiatives have been identified, with implementation to begin in 2012/13.

In the 2012 Great Place to Work survey, we anticipate stronger ratings overall and on employee recognition questions in particular.

Performance by Measure	2011/12
Progress in implementing post-survey implementation plan	✓
Increased staff satisfaction with recognition initiatives	B
Improved outcomes on Great Place to Work survey	B

**Highlights for this Objective**

**Post-2010 Survey Follow-Up**

**Staff Discussions**—Throughout 2011/12, a series of program-based consultation sessions with employees took place, guided by an external facilitator. Our executive director, HR manager, program managers, and coordinators attended all of the sessions.

Participating staff were invited to identify “what’s going well” and “what needs to improve”—feedback that has shaped Cool Aid’s post-survey implementation plan as well as our refreshed Learning & Growth objectives. Topics explored included recognition, pride, psychologically and emotionally healthy workplace, feeling valued, and leadership and management.

**Post-2010 Survey Implementation Plan**—The plan outlines the consolidated results from the 2010 Great Place to Work employee survey, priority areas, recommendations from the staff consultation process, timelines, outcomes and progress to date.

**Learning & Growth Priorities**  
identified in staff discussions on 2010 Great Place to Work survey

Training & development
Workplace wellness
Workplace culture
Recognition & appreciation

**Organizational Culture**

Staff discussions of the 2010 survey results led to the formation of a Culture Change Committee in the Shelter Program. Among other initiatives, this team is developing a “principles and practices” document, to help shape the work culture that Shelter staff want to cultivate.

**Team Building**

One of the strengths that emerged from both the 2010 Great Place to Work survey and subsequent discussions was the value of teamwork and the vital role of the team in providing peer support. Each program area—Housing, Shelters, Community Health Services—held off-site staff retreats in 2011/12 and organized a variety of other team-strengthening initiatives.

**Internal Communication**

In response to staff feedback regarding better communication, synopses of monthly Management Team Committee and Board meetings are being distributed to all staff. The newly designed quarterly program reports to the Board are also being shared with program staff.

2012/13 & Beyond	Thinking Ahead	Learning & Growth
------------------	----------------	-------------------

### Areas for Improvement

- Participate in the 2012 Great Place to Work survey; assess improvement in priority areas (see sidebar).
- Identify factors contributing to casual resignations during their first year of service. (Our 60-day new employee survey indicates that people apply for positions because of Cool Aid's reputation in the community and because their values align with the agency's. What changes in the first year of employment?)
- Implement new employee recognition initiatives.

Great Place to Work Survey	2010 PR	2012 targets
<b>Overall</b>	<b>64%</b>	<b>71%</b>
Training & development	59%	70%
Workplace wellness	71%	77%
Employee recognition	57%	67%

PR=Positive Response: % of staff choosing 4 or 5 ("often true" or "almost always true") on survey questions.

### Attracting & Retaining Qualified Staff

- Explore different advertising options for hard-to-fill job vacancies.
- Introduce an internal application form to make it easier for internal candidates to apply for positions.
- Develop alternative(s) for agency-wide orientation sessions. Under consideration: online and/or video-based orientations that can more easily be scheduled and are less resource-intensive.

### Staff Engagement

- Identify potential improvements to the staff intranet. (A small working group for this purpose has been formed.)

### Workplace Wellness

- Expand opportunities for health- and safety-related training, especially training related to managing aggressive behaviours.
- Promote the Employee and Family Assistance Program.
- Update policies related to Bill 14 and respectful workplace practices; develop appropriate training for managers, supervisors and staff.

(Bill 14, or the Workers' Compensation Amendment Act 2011, comes into effect July 1, 2012, making new provision for compensation for mental stress resulting from a variety of work-related stressors, including traumatic events, bullying and harassment in the workplace. Cool Aid policies will need to revise definitions for mental stress, bullying and harassment, outline our role as an employer and the role of employees, and identify steps to be taken when they occur.)

### Expanded Training & Development

- Strengthen management and leadership skills. (The Leadership Development Program launched in March 2012 with a session on organizational culture. Upcoming topics for these externally facilitated group learning sessions: Dealing with Conflict as a Leader (April 2012), Communication in Crucial Conversations (Sept. 2012).)
- Develop guidelines for mid-level supervisors on managing the probationary period.

## Financial Perspective

How

### About This Perspective

*This perspective focuses on securing the financial resources necessary to enable us to meet our Stakeholder objectives and on managing existing resources wisely.*

### Strategic Objectives

- 1—Obtain additional funding
- 2—Expand funding base
- 3—Optimize resource utilization

Objective 1

Obtain additional funding

Financial

### Performance Measure Synopsis

**Access Capital Campaign**—We were able to wrap up the Access capital campaign ahead of schedule thanks, in large part, to a \$534,000 contribution from an anonymous donor. The campaign target of \$5.3 million has been met.

**Grants & Sponsorships**—A total of \$1.02 million in grants and sponsorships was secured for 2011/12, which includes the \$534,000 Access contribution. Excluding the Access contribution, the target of \$338,000 was exceeded by 44%.

Performance by Measure	2011/12
Success at raising funds for housing development plan	—
Successful wrap-up of Access capital plan	✓
Success in attracting grants & sponsorships	✓

Objective 2

Expand funding base

Financial

### Performance Measure Synopsis

◆ **Direct Mail**—Of the different components of our fund development plan, direct mail was the only one below target: \$42,796 actual vs. \$59,000 target.

Contributing factors: one less mailing than in previous years, a mailing list with too many lapsed donors (which drove down the contribution rate), and disappointing results from a prospecting of doctors and neighbourhoods with a high concentration of donors. Lesson learned: To be successful, prospecting must be highly targeted.

**Online Donations**—Online donations grew modestly, exceeding the target by 5% to reach \$31,639, which is 24% above 2010/11 levels.

**Endowment Fund**—Endowment fund contributions surpassed target by 60%, totalling almost \$16,000.

**Fund Development Plan**—Implementing the fund development plan brought in \$1.04 million, well above the target for 2011/12 (\$811K). In addition, \$441,000 was pledged for future years. (Note: "Total dollars" includes both operational and capital funds.)

Performance by Measure	2011/12
Growth in direct mail proceeds	◆
Growth in online donations	✓
Contributions to endowment fund	✓
Total dollars from implementing fund development plan	✓

Objective 3 Optimize resource utilization Financial

Performance Measure Synopsis

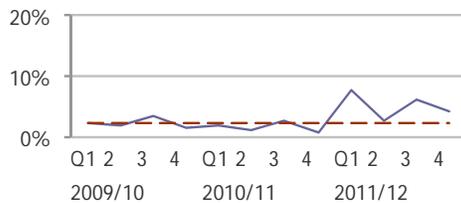
✘ ✘ For both types of housing, 2011/12 average monthly vacancy rates were well outside the target range:

Average Monthly Vacancy Rate	2011/12 Actual	Target Range
Supportive housing (9 sites)	5.1%	< 2.6%
Assisted living (1 site)	12.1%	< 4.5%

Performance by Measure	2011/12
Supportive housing vacancy rate within target range	✘
Assisted living vacancy rate within target range	✘

Discussion

Supportive Housing (275 units at 9 sites)  
Actual Vacancy Rate vs. Target < 2.6%



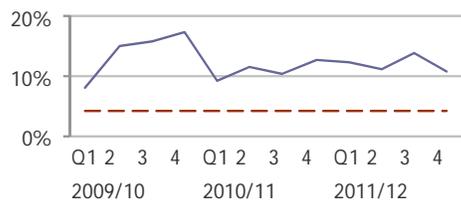
Two factors were significant contributors to above average vacancy rates in 2011/12:

- 36 Olympic Vista units were added to the supportive housing portfolio in May 2011, accounting for the spike in Q1 2011/12.
- To accommodate major renovations at Queens Manor and minimize disruptions to tenants, a rotating block of units has been kept vacant, beginning in Q3 2011/12.

These were not the only factors, however, since the average vacancy rate for the other 7 sites (3.7%) was still outside the target range.

Vacancy rates at 4 sites—Pandora Apartments, Mike Gidora Place, Cedar Grove, and Fairway Woods—were unusually high in the third and/or fourth quarters. Preliminary results of our analysis suggest that an unusual confluence of evictions, abandonments and deaths occurred in Q3-Q4 but it is not yet clear whether other factors were at play.

Assisted Living (45 units at Hillside Terrace)  
Actual Vacancy Rate vs. Target < 4.5%



Throughout 2011/12, the average vacancy rate at Hillside Terrace continued to be a concern and a challenge.

The intake process for assisted living is quite complex, involving as it does multiple parties and partners. Discussions with referring agencies continue to take place.

Target Range

For the last 3 years, vacancy rates at Hillside Terrace have remained stubbornly outside the target range, generally hovering between 10% and 12%. The question naturally arises: Is a vacancy target of less than 4.5% realistic for an assisted living building?

It is a question we periodically revisit and debate internally. We continue to believe the target range is achievable if systemic issues can be resolved.

2012/13  
& Beyond

Thinking Ahead

Financial

### Areas for Improvement

Reduce housing vacancy rates (Financial Objective 3)

- Scrutinize internal processes for potential bottlenecks, gaps, and other weaknesses.
- Look for opportunities to further streamline or optimize internal processes.
- Continue collaborating with referring agencies to accelerate the referral process.

### Additional Funding

Cool Aid's new **housing development plan** will be the primary focus for obtaining the funds needed to meet our 2018 housing targets (Stakeholder Objective 1; Process & Technology Objective 1).

### Expanded Funding Base

Our **fund development plan**, with its 3-year horizon, will continue to guide our efforts to raise funds for a variety of operational and capital needs that are not currently being funded. The legacy campaign will feature prominently in 2012/13 and 2013/14.

The End