

COOL AID'S PRIME OBJECTIVE

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

LOOKING BACK

THINKING AHEAD

**Balanced Scorecard  
Summary Report  
2007/08**

**Victoria Cool Aid Society  
September 2008**

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Looking Back

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Thinking Ahead

The Victoria Cool Aid Society is pleased to offer our second annual report card to the community. This scorecard report for 2007/08 is an evaluation of our performance on meeting the strategic goals and priorities that we have set for ourselves.

Cool Aid's **strategy map** includes an overarching objective to "**optimize our people, resources and processes to improve the quality of life for at-risk citizens and our community.**" This year's report card demonstrates that this objective has been well met.

Within fiscal 2007/08 Cool Aid has expanded programs and increased services for vulnerable populations. 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, allowed us to:

- provide an additional 11,700 shelter bed nights, totalling over 45,000 shelter bed nights
- serve an additional 26,250 meals, for a total of 164,250 meals served
- deliver medical and dental care in 29,000 appointments
- make further investments into our existing 256 units of supportive housing
- begin working with all community stakeholders on a new purpose-built emergency shelter facility
- provide support and services to 100 individuals each day on their paths to recovery, and
- assist 839 people in gaining employment.

As we look back over our accomplishments, there are certainly some highlights that stand out:

Our property portfolio was increased at the end of last year with the addition of **Desmond House**, a 27-unit single room occupancy hotel, the first of its kind for Cool Aid. Over the past twelve months, our Housing program has taken on the challenge of fully integrating this SRO into our best practice model of service delivery, building a sense of community amongst the Desmond House tenants. We are grateful to BC Housing for giving us this opportunity.

Cool Aid's Shelter program also saw expansion during the course of this year with the purchase of a rooming house on Dowler Place and the creation of the **Next Steps Transitional Shelter**. With the financial support of BC Housing and the United Way, this unique program works intensively with identified shelter clients who are ready to take the "next step" in improving their circumstances. We worked closely with the immediate neighbours of Dowler Place, representatives of the North Park Neighbourhood Association, the City of Victoria, and the Victoria Police while we were developing the program, culminating in the creation of a successful **Good Neighbour Agreement** that was signed off by all parties in September 2007.

In the area of health services, our **REES** program was expanded with the creation of the Community Outreach, Options and Linkages (**COOL**) Program. This pilot was made possible with a grant from the United Way's Mental Health and Addictions Impact Council. In the relatively short time that the COOL Outreach program has been operating, it has proven to be a valuable resource to a population that is often underserved. To date, outreach and support services have been provided to over one hundred people with concurrent disorders.

The **ACCESS Health Centre**, a partnership initiative with AIDS Vancouver Island, continued to be a high priority. Thanks in large part to a recommendation within the report produced from the Mayor's Task Force on Mental Health, Addictions and Homelessness, we received much needed financial support to ensure that the doors to ACCESS will open. The Vancouver Island Health Authority provided a \$1 million dollar grant, the Capital Regional District has pledged \$545,000, and we have a commitment from BC Housing of \$205,000 from the Housing Endowment Fund. We also received our final \$100,000 Major Capital Project Grant from BC Gaming, for a total of \$300,000. All together, we have raised \$3.1 million of the \$5.3 million capital required and are working to raise the balance necessary over the next three years to complete the project debt-free.

We are also in the predevelopment stages of another major capital initiative, the **Ellice Street** shelter and transitional housing project. Thanks to a memorandum of understanding between the City of Victoria and BC Housing, we are in the planning stages of replacing Streetlink with a new purpose-built facility that will offer 82 shelter beds, 2 emergency shelter units for families, and 23 units of transitional housing. Now that the project has moved successfully through the rezoning process, Cool Aid will continue to work closely with a committee that includes many of the immediate neighbours to ensure that their concerns around building design and program operation are addressed. It is our intention to create a **Good Neighbour Agreement** for this project that will ensure an ongoing process for addressing neighbourhood issues as they arise.

During this past year, Cool Aid also played a key role in several initiatives that will shape our community's response to addressing homelessness and challenges faced by those living with mental health and addiction issues. The Mayor's Task Force brought together community leaders and experts to break down the issue of homelessness and develop a community-owned service delivery model to respond to social and health challenges. In February 2008, the **Greater Victoria Coalition to End Homelessness** was established to coordinate the actions of stakeholders and service providers to meet action plan targets and develop additional strategies to end homelessness. We are pleased that the information gathered through the Cool Aid-led 2007 Homeless Needs Survey was helpful in shaping the recommendations and actions of these initiatives.

Looking ahead, as the Victoria Cool Aid Society now enters into its fifth decade of **building hope, lives and community**, we will continue to adapt to the changing needs of our region, and are in a strong position to make a significant contribution towards addressing the challenge of homelessness in our city.

### **Our Mandate**

To provide holistic shelter, housing, and community health services to marginalized adults in the Victoria area.

### **Our Mission**

We work to eliminate homelessness by working in partnership with others to develop community-based solutions. We are committed to working in a non-judgmental way with people who are marginalized, homeless and hard-to-house. We advocate for and provide emergency shelter, supportive housing, and integrated healthcare service to marginalized adults in the Victoria area.

### **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**

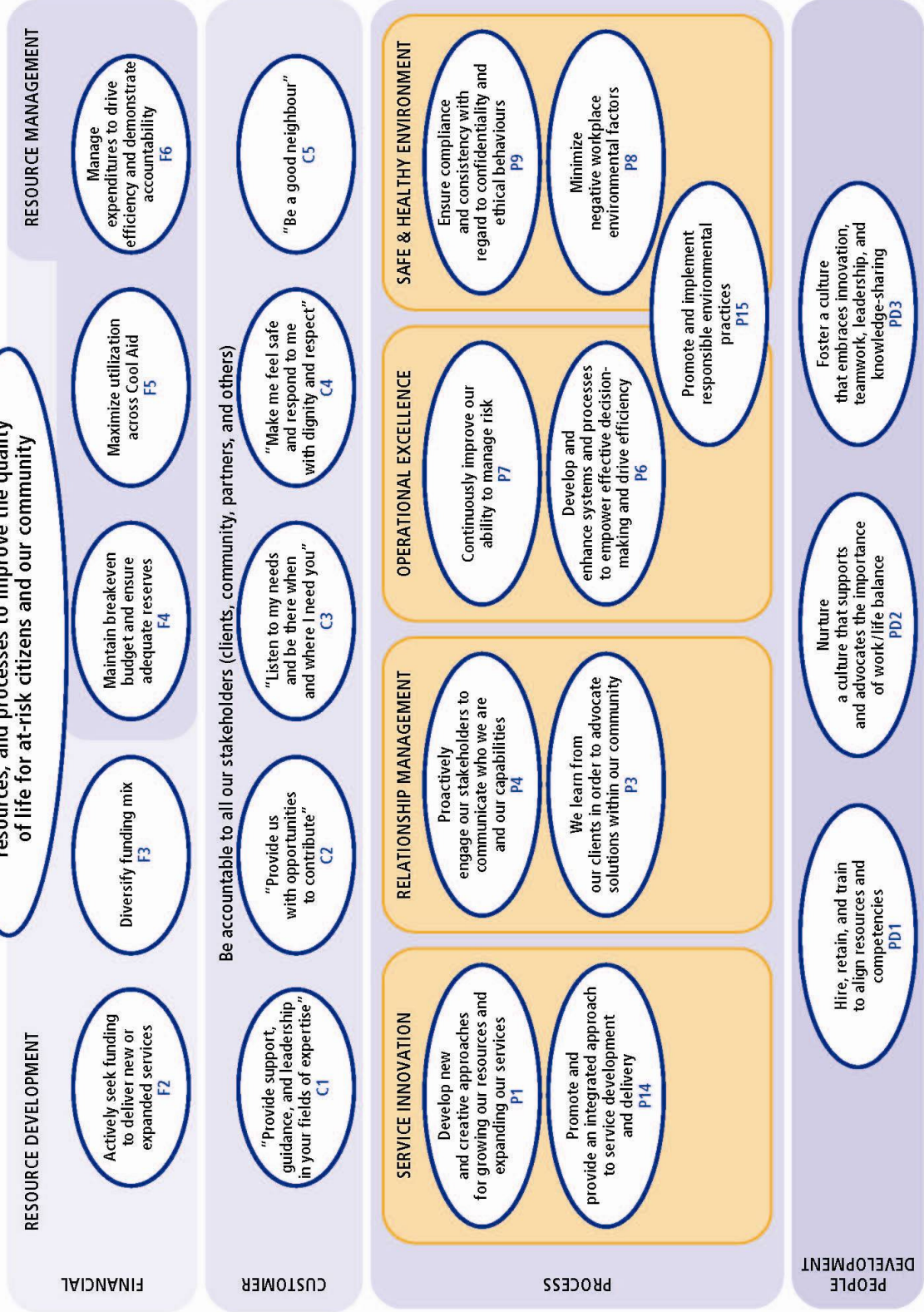
- We demonstrate reliability, good faith, and integrity in all our relationships.
- We foster a workplace culture that embraces innovation, teamwork, leadership, and knowledge-sharing.
- We make and keep our commitments.
- We are accountable for our actions and measure and share our contribution to the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








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











Financial Perspective		annual score
F02	<b>Actively seek funding to deliver new or expanded services or programs</b> Measure F02-1: Variance between additional funding received versus identified need	
F03	<b>Diversify funding mix</b> Measure F03-1: Funds from new sources	
	Measure F03-2: Innovations in funding diversification	
F04	<b>Maintain breakeven budget and ensure adequate reserves</b> Measure F04-1: Percent variance from budget	
	Measure F04-2: Percentage of capital asset funding needs that are being met by Cool Aid	
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		annual score
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: Whether we meet our commitments to listen to our customers and respond appropriately	
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 staff	
C05	<b>"Be a good neighbour"</b> Measure C05-1: Our performance in acting as good neighbours	

Process Perspective		annual score
P01	<b>Develop new and creative approaches for growing our resources and expanding our services</b> Measure P01-1: Innovative approaches to growing resources and expanding services	
P03	<b>We learn from our clients in order to advocate solutions within our community</b> Measure P03-1: Progress in advocating for clients with decision-makers	
P04	<b>Proactively engage our stakeholders to communicate who we are and our capabilities</b> Measure P04-1: Proactive communication initiatives	

Process Perspective (cont'd)		annual score
P06	<b>Develop and enhance systems and processes to empower effective decision-making and drive efficiency</b> (New performance measures are in development)	
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> (New performance measures are in development)	
P14	<b>Promote and provide an integrated approach to service development and delivery</b> (New objective adopted in 2007/08; measures in development)	
P15	<b>Promote and implement responsible environmental practices</b> (New objective adopted in 2007/08; measures in development)	

People Development Perspective		annual score
PD01	<b>Hire, retain, and train to align resources and competencies</b> Measure PD01-1: Time required to fill priority positions Measure PD01-2: Turnover rate for casual staff Measure PD01-3: Turnover rate for permanent staff Measure PD01-4: Exit survey indicators	   
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	 

Strategic Perspective  
**FINANCIAL**

**Perspective Overview**

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

*Resource development* concentrates on two interrelated strategic objectives: funding for new or expanded services (F02) and funding diversity (F03).

*Resource management* comprises three objectives (F04, F05, F06), and incorporates our commitment to accountability, transparency, and efficiency.

**Perspective Report Card**

Measure	Q1	Q2	Q3	Q4	Year
F02-1	At or above plan	At or above plan	At or above plan	At or above plan	At or above plan
F03-1	Below plan	Below plan	Below plan	Below plan	Below plan
F03-2	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed
F04-1	Caution	Caution	Caution	Caution	Caution
F04-2	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed	Data not available; process improvements needed
F05-1	At or above plan	At or above plan	At or above plan	At or above plan	At or above plan
F06-1	Measure in development	Measure in development	Measure in development	Measure in development	Measure in development

**Looking Back**

**Performance Overview**

*Resource management*

Cool Aid’s overall financial position continues to be strong and well-managed and is a reliable base from which we can continue to expand our activities in support of our mission and strategic goals.

We ended the fiscal year with a surplus of \$400,744. After adjustments related to externally restricted funds and capital assets, this surplus resulted in an increase to unrestricted net assets of \$170,756, slightly above the 1% breakeven target we had set for ourselves (measure F04-1).

The reason for the caution attached to the performance of this measure is to recognize that within the not-for-profit world, a surplus is not necessarily a blessing—surpluses can signal that services are not being provided.

When we look at measure F04-1 in conjunction with our service utilization measure (F05-1), this is clearly not a concern as service utilization at our shelter, housing, and health facilities continues to be at or very close to capacity.

Some of the financial process improvements we had hoped to implement during 2007/08 are behind schedule or temporarily on hold (measures F04-2, F06-1), the main reason being the departure of our long-time Finance manager and a considerable delay before we could find a suitable replacement.

*Resource development*

In 2007/08, we were successful in nine of out of every ten funding requests we submitted. This high success rate is attributable to a combination of factors, in particular: funder confidence in Cool Aid, increased public awareness, and the strategic focus of our proposals.

However, we did not come close to meeting our targets for one of our funding diversity measures (F03-1). A strategic assessment we initiated in 2007/08 suggests that it is our performance *measure*, rather than our performance, that is the problem. We will be examining alternate ways to measure funding diversity in 2008/09.

**Note**  
See Appendix for full descriptions of F02, F03, and our other Financial objectives.

## Thinking Ahead

### Funding Diversity

A strategic review of our funding sources and, in particular, our funding mix will be one of the agenda items at the annual retreat of Cool Aid's Board of Directors (September 2008).

### Accountability, Transparency, Efficiency

As a nonprofit organization that relies heavily on public funding, Cool Aid is accountable to multiple stakeholders and to the community as a whole. With a new Finance manager in place as of May 2008, we look forward to working with her to identify new or improved ways of implementing, and demonstrating, accountability and transparency, especially for our resource management objectives.

Following are some of the areas we will examine during the coming year:

- Service capacity and utilization indicators
- Cost savings and efficiency
- Annual facilities maintenance planning
- Capital asset planning

Strategic Perspective

**CUSTOMER**

**About This Perspective**

In the world of business, the bottom line is financial, even among those companies that have adopted the balanced scorecard.

At Cool Aid, our Customer perspective encompasses five strategic objectives that we consider to be *our* bottom line—our *raison d'être*, why we exist.

*Who are Cool Aid's customers? Or, to use another common term: Who are our stakeholders?*<sup>1</sup> We generally include both clients and community under this perspective. Two of our Customer objectives are community-focused (C01, C05), two are client-centred (C03, C04), and one (C02) brings together both clients and community.

**Perspective Report Card**

Measure	Q1	Q2	Q3	Q4	Year
C01-1					
C02-1					
C03-1					
C04-1					
C05-1					

**Note**

See Appendix for full descriptions of C01, C05, and our other Customer objectives.

**Looking Back**

**Performance Synopsis**

Our overall performance on Customer objectives comes close to being an "A" — with one exception.

Measure C04-1—*Client satisfaction with safety and relationships with agency staff*—sets a target of 90% of surveyed clients providing a favourable response to questions regarding their feelings of safety and the quality of their relationships with staff. We rated our performance as "grey" because we did not undertake an agency-wide client survey in 2007/08.

**Knowledge-Sharing and Leadership**

C01: "Provide support, guidance and leadership in your fields of expertise"

Knowledge-sharing is a core Cool Aid value and permeates our organizational culture. Every year, we invest considerable time and effort in sharing our acquired expertise—in health services, housing, and shelters—with others.

In anticipation of reporting on our performance in this area, we examined, for the first time, the *full* range of our knowledge-sharing and leadership activities. The actual scope and breadth of these activities in 2007/08 came as a pleasant surprise, even to us. Only the barest outline can be offered in this summary report.

*How we share our knowledge:* We actively seek out and respond to opportunities to share our knowledge by:

- responding to information requests
- providing feedback and input on initiatives organized by other social service organizations
- accepting invitations to speak at conferences
- hosting or participating in workshops and small group presentations
- teaching, training, and mentoring

*How we show leadership:* Leadership can take many forms. At Cool Aid, we have a strong bias for participative leadership. We tend to focus our leadership energies and activities in these three areas:

- leadership by collaboration
- leadership by initiative
- leadership by recognition for best practices

**Objective**

C01  
community  
focus

<sup>1</sup> Not all of our stakeholders are represented in our Customer perspective. Cool Aid's staff are the focus of our People Development perspective, while our Financial perspective is of particular interest to our funders, donors, and other supporters.

Our involvement with the Greater Victoria Coalition to End Homelessness is just one example of collaborative leadership. This new regional organization, with the mandate of spearheading an action plan and developing strategies to end homelessness, has Cool Aid representatives sitting on several of its lead committees.

### Good Neighbour

C05: "Be a good neighbour"

In today's business world, many companies strive to be "good corporate citizens." For Cool Aid, the equivalent goal is to be a good neighbour in *all* of the neighbourhoods in which we provide services related to health, housing, and emergency shelter.

Objective
C05 community focus

Cool Aid's good neighbour approach has three main components:

- taking good care of our sites, which includes presentation and security;
- working with our neighbours, to address community-wide problems and opportunities; and
- working with our clients, to help them reconnect, to feel part of the community, to be good neighbours themselves.

In several ways, 2007/08 was a notable year, with both challenges and achievements for our good neighbour policies. One of the biggest challenges: the changing dynamics of the downtown street population, along with increasingly more visible drug trafficking and drug use. Even though many of these people may not be Cool Aid clients, we, like our neighbours, had to take extra measures to ensure that our own sites were presentable and safe.

Being a good neighbour, for Cool Aid, is a continuous, ongoing *process*, well-integrated into our daily operations. Building good neighbourhood relationships requires numerous tiny steps and actions, so it is not always possible to clearly demonstrate results. For 2007/08, however, we *can* report on a significant milestone: Our Next Steps transitional shelter and the North Park Neighbourhood Association formally signed a Good Neighbour Agreement, which was the culmination of months of consultation.

Since the signing, Cool Aid's efforts to be "a good North Park neighbour" have continued unabated—and were lauded in a May 2008 letter from the Association's president (who lives directly behind the shelter).

### Listening and Responding to Our Clients

C03: "Listen to my needs and be there when and where I need you"

C04: "Make me feel safe and respond to me with dignity and respect"

Because we did not carry out an agency-wide client survey in 2007/08, we cannot report on our actual performance relative to our performance target. We can, however, offer an overview of how we try to achieve this objective.

Objective
C03 C04 client- centred

- Frequent regular and ad hoc meetings with clients and staff, both separately and together, one-on-one and in groups. (Clients are as important as staff in creating an atmosphere of dignity, respect, and safety.)
- Ongoing orientation for program staff on how to treat clients, provide tolerant services, and always find ways to role-model compassion and respect.
- Client feedback forms.
- Regular meetings with residents to talk about working together to develop an environment of dignity and respect. Clients have identified ways they can participate and contribute. This is the start of working toward a client code of conduct. Clients have commented that they recognize that they also have influence over their environment, and feel empowered to help build a sense of community.

### Helping Others to Make a Difference

C02: "Provide us with opportunities to contribute"

We experienced a marked increase in interest from the community, especially the business sector, in participating in particular fundraising events to help our clients.

Objective
C02 clients & community

We also witnessed increased levels of client participation in 2007/08. Two examples:

- Several clients were members of committees set up to plan for the 40<sup>th</sup> Anniversary celebrations.
- Both clients and staff helped facilitate conferences hosted by our REES Network.

**Thinking Ahead**

**Client and Community Input**

We recognize the need to formalize and standardize the methods by which we elicit input from our clients, our neighbours, and other stakeholders in the community. Our plans to develop a *stakeholder input framework* are discussed under our Process perspective.

Objectives
P06
C03
C04
C05

**Good Neighbour**

We will continue working hard to nurture the understanding, trust, and support of people who live and work in the vicinity of the proposed *Ellice Street* shelter. Our measure of success: a formal good neighbour agreement for the new shelter that meets or exceeds the standards achieved by the North Park/Next Steps agreement.

Objective
C05

**Knowledge-Sharing and Leadership**

We will continue to play key roles on the Greater Victoria Coalition to End Homelessness and make significant contributions to the development of a 10-year plan to end homelessness in Greater Victoria.

Objective
C01

Strategic Perspective

**PROCESS**

**About This Perspective**

Cool Aid's ability to fulfil its mandate is based on three cornerstone perspectives: Financial, People Development, and Process.

Cool Aid's Process perspective comprises nine strategic objectives, each focused on business processes that we have identified as strategically important and necessary.

**Looking Back**

**Performance Synopsis**

We are pleased to be able to report good-to-strong performance for five of the nine Process objectives for which measures are in place.

We do not yet have performance measures for four Process objectives. Two of these objectives were newly approved in 2007/08 (P14, P15). The other two (P06, P09) are not new objectives but we concluded that we needed stronger measures, which will be developed in 2008/09.

**Data and Information Management**

Performance-based reporting relies heavily on accurate and accessible data. Balanced scorecard reporting depends on information from virtually all parts of an organization.

In the course of preparing our second annual balanced scorecard report, it became obvious that we need to address a number of data issues. These include but are not limited to:

- data duplication and redundancies
- incomplete data and data gaps
- data accessibility

The good news is that, once these issues are addressed (which *will* take time), we will be able to do much more with the data we are already collecting, from stronger analysis to strategic inputs into decision-making.

**Service Integration**

The need for better service integration has become widely recognized throughout the social service sector. Cool Aid is a long-time advocate for more integrated service delivery models and, in 2007/08, was an active member of several committees and organizations that have adopted service integration as a foundational principle.

Chief among these is the strong Cool Aid representation on several committees of the Greater Victoria Coalition to End Homelessness, which will continue and evolve during 2008/09 and beyond.

In addition to various external initiatives with our partners, in late 2007/08, we also began reviewing our internal processes, in order to identify gaps in integration, areas for improvement, issues and constraints, and potential budgetary implications.

**Stakeholder Communications**

- Cool Aid's media profile enjoyed a boost in 2007/08, due in part to continued awareness of and interest in homelessness issues, and in part to specific initiatives we undertook to proactively "communicate who we are and our capabilities." Cool Aid is now seen by the media as the "go-to" organization for comment on homelessness issues.

**Perspective Report Card**

Measure	Q1	Q2	Q3	Q4	Year
P01-1					
P03-1					
P04-1					
P06-x					
P07-1					
P08-1					
P08-2					
P09-x					
P14-x					
P15-x					

**Note**

See Appendix for full descriptions of P14, P06, and our other Process objectives.

**Objective**

P06

**Objective**

P14

**Objective**

P04

- In December 2007, we launched our newly designed website, www.CoolAid.org, which has experienced steadily increasing traffic with each passing month. Our employment page is the most popular destination on the site. The new Online Resource Guide and program pages are also frequently accessed.
- Planning for Cool Aid’s 40<sup>th</sup> Anniversary began in earnest in late 2007/08, with focus group brainstorming and committee participation from staff, clients, and the community.

**Balanced Scorecard (BSC) Development**

- We completed a very extensive review of our strategic objectives and associated performance measures in 2007/08. In addition to adding two new objectives (P14, P15), we sharpened the focus of several other objectives. Performance measures for three perspectives—Customer, Process, People Development—were closely scrutinized, then finetuned, replaced, or strengthened.
- For the fourth quarter, we introduced a new format for quarterly BSC reports to our Board of Directors: A one-page “performance dashboard” (similar to that included in this report), supplemented by a very concise overview of performance by strategic objective.

<b>Objective</b>
P06

**Thinking Ahead**

**Data and Information Management**

In the first few years of balanced scorecard implementation, even the largest for-profit organizations discover that they do not have all the data they need to adequately assess and report on all their performance measures. Cool Aid, still in the initial stages of BSC development, is therefore in good company.

<b>Objective</b>
P06

In addition to addressing the data issues identified above, we also need to begin thinking of, and treating, data and information as vital *organizational resources*, as important as staff and funding are for service development and delivery.

Within the next two to three years, we will need to *significantly* enhance our non-financial information systems and processes, but not merely for balanced scorecard purposes. The focus of objective P06 is on internal systems and processes, for the purpose of “empowering decision-making and driving efficiency.” To fulfil that objective, we need a more solid *information infrastructure* that will support such activities as:

- integrated service development and delivery, internally and externally
- more sophisticated reporting on *outputs* and, in the longer term, *outcomes*
- leaner, more interpretive reporting to our Board of Directors (more concise, more analytical, less descriptive), not just at the agency level but also at the program level
- more analytical uses of information, to improve our ability to be, and be seen to be, accountable
- more strategic applications of information, to inform our strategic planning process

**Service Integration**

Information, and especially information-sharing, will be an essential prerequisite of enhanced service integration, both internally and externally. Information-sharing is not, however, merely a matter of acquiring the right software or implementing the protocols required to enable systems to “talk” to each other—although those certainly *are* challenges that we, and other agencies, face.

<b>Objectives</b>
P14 P09

The whole area of personal privacy and confidentiality is undergoing major change. Finding and maintaining the right balance between respecting individual rights and integrated service provision is a challenge that virtually all service providers face, as they contemplate greater inter-agency sharing.

Cool Aid is working closely with our many partners on inter-agency sharing of information. At the same time, we also need to assess our own internal systems, processes, and policies, to identify and address obstacles to information-sharing between our own program areas.

**Stakeholder Input**

Several of our strategic objectives and performance measures rely, in whole or in part, on input from our stakeholders. While Cool Aid has a very strong record for inviting (and responding to) feedback, little of that information is currently quantifiable. How, and whether, stakeholder input is formally documented varies widely. Even when documented, stakeholder input is not always shared as widely as it could be.

Objectives
C03, C04 C05, P08, PD03

During 2008/09, we anticipate developing a preliminary framework to guide our future efforts to elicit and share both formal and informal stakeholder input.

**Risk Management**

There are significant potential benefits to be gained from integrating our incident tracking process with our risk management process.

Objectives
P07, P08

**Balanced Scorecard Development**

Below are two of the initiatives we are considering for 2008/09:

- Better integration of balanced scorecard reports and management reports
- Further development (and documentation) of the criteria we use to assess our performance

Objective
P06

Strategic Perspective  
**PEOPLE DEVELOPMENT**

**Perspective Overview**

The People Development perspective, also known as the Learning and Growth perspective, is the foundation of our strategy map. Within this perspective, we have purposely aligned our recruitment and retention objectives with complementary objectives on workplace culture and work/life balance.

**Looking Back**

**Performance Synopsis**

Each of the three People Development objectives contains at least one measure that has met or exceeded performance targets. In total, we have eight measures for our three objectives. Three of the four non-reportable measures require more data. The fourth measure will establish a staff survey framework in 2008/09.

Two measures did not consistently meet performance targets during 2007/08: PD01-2 and PD01-3, which focus on turnover rates for casual and permanent employees respectively. Recruitment and retention are discussed in more depth below.

**Growth**

At the end of 2007/08, Cool Aid had 24% more employees than in the previous fiscal year, a significant increase for any organization. Why such a large increase? There are several reasons, chief among them:

- Cool Aid took on responsibility for a number of additional facilities in 2007/08.
- Increased funding meant more services and enhanced services.
- Introduction of several new types of positions, including: team leaders, client services workers, schedulers, program coordinators, and facilities supervisor.

Growth status at year-end	FY 2006/07	FY 2007/08	% Change
<b>Total employees</b>	<b>162</b>	<b>201</b>	<b>24%</b>
Vacant positions	5	10	100%
Total positions	167	211	26%

**Recruitment and Retention**

Recruitment and retention are of utmost importance. The most common recruiting challenges within the social services sector (particularly in larger communities, including Victoria) are economic conditions, which are attracting people to other sectors, a shortage of qualified staff, and non-competitive wage rates (for certain positions) within the sector. Victoria, unlike the lower mainland, is also struggling with a lack of local applicants. Of all the positions within the social services sector, skilled residential care workers, community support workers, family support workers, and adult, youth and child workers are of greatest challenge and difficulty concerning recruiting.

Organizations within the social services sector are reporting turnover rates in the 15-20% range. Cool Aid's turnover rates are well below provincial averages for the sector. Although low, that still translates into many hours devoted to hiring and training new staff.

We must mitigate our turnover rates wherever possible by focusing our efforts on reliable strategies in order to offset the significant hours it takes to advertise, hire, and train.

Improvements introduced this year included: augmented benefits, such as our Employee Assistance Program, now accessible to all staff; improved reference and performance review processes; safer workplace

**Perspective Report Card**

Measure	Q1	Q2	Q3	Q4	Year
PD01-1	Blue	Blue	Blue	Blue	Blue
PD01-2	Green	Yellow	Red	Yellow	Yellow
PD01-3	Green	Green	Yellow	Yellow	Green
PD01-4	Blue	Blue	Blue	Blue	Blue
PD02-1	Green	Green	Green	Green	Green
PD02-2	Blue	Blue	Blue	Blue	Blue
PD03-1	Green	Green	Green	Green	Green
PD03-2	Grey	Grey	Grey	Grey	Grey

policies and training; ways for new and departing employees to share their experiences through new hire and exit surveys; and better HR data to managers to assist managers with employee tracking and development.

We continue to look for ways to improve upon recruitment challenges by tracking the length of time to fill particular positions, focusing initiatives on the most challenging-to-fill positions.

In 2007/08, we advertised more extensively and widely, promoted our employment web page, revitalized our advertisement templates, and attracted more practicum students. Our programs have well established relationships with both the University of Victoria and Camosun College in promoting, through practicum programs and informational seminars, Cool Aid and the sector. In the 2007/08 fiscal year, Cool Aid hosted 52 practicum and summer job students.

### Organizational Culture and Communication

Preliminary informal feedback suggests that we would benefit by developing additional internal communication strategies to engage staff. Our three annual staff events are well attended. There are many ongoing newsworthy events and successes that we have begun to share as staff indicate a desire to learn more about the organization. Improvements to our staff intranet and our Occupational Health and Safety Committee have benefited from these initiatives.

### Strategic Planning and Reporting

In 2007/08, we beefed up our performance measures, especially for objective PD01. We also introduced new reporting to the programs on HR data. We are now collecting a much broader range of HR data, with significant analytical and strategic potential.

## Thinking Ahead

### Recruitment and Retention

We will explore whether some steps in the hiring process can be further automated or streamlined. Potential benefits include faster processing of applications/resumes, less time devoted to handling and screening, increased efficiency, easier identification of bottlenecks, and data for analysis of the candidate pool (e.g., internal vs. external applicants).

Other recruitment and retention strategies include:

- Tabulate the feedback provided through our 60-day new hire surveys. These surveys are regularly completed and are helpful in learning about new employee experiences. There may be some retention initiatives we could develop as a result.
- Promote Cool Aid as an employer of choice through the creation of online web tours of various Cool Aid programs.
- Develop processes to allow us to identify strengths/weaknesses in recruitment and to enable reporting for measure PD01-1.

### Organizational Culture and Communication

We are overdue for establishing a consistent formal employee survey framework. This will include seeking input from staff on what is important, ensuring that results are communicated back to staff, and that subsequent initiatives and achievements are also shared.

### Information Management

Address data gaps and accessibility issues with pre-2007/08 data in order to establish, at minimum, a three-year foundation of key HR data.

### Strategic Planning

Continue to enhance strategic/analytical uses of HR data. Example: redesign quarterly HR reports to the Board to include more interpretive data, less descriptive data (might be more useful for managers too).

	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

	Objective	What we mean by this objective	Theme
<b>Process Perspective</b>			
P01	Develop new and creative approaches for growing our resources and expanding our services	Recognizing that we require the flexibility to respond to emerging clients' needs, we will develop new and creative approaches for growing our resources.	Service Innovation
P03	We learn from our clients in order to advocate solutions within our community	As a "client-centred" social service organization, we seek input from our clients in order to advocate for and provide meaningful services and supports.	Relationship Management
P04	Proactively 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>People Development 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