



COOL AID'S PRIME OBJECTIVE

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

Victoria Cool Aid Society STRATEGIC PLAN

2008/09 Balanced Scorecard Annual Report to the Community

Looking Back ... Thinking Ahead

August 2009

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Looking Back ... Thinking Ahead

An organization as large and diverse as Cool Aid requires an overarching process that places strategy at the heart of its management systems in order to achieve its mission and mandate. Our strategic plan is based on the balanced scorecard approach, utilizing four perspectives—financial, customer, internal process, and people development—as the framework to shape and guide best practices to respond to needs in the community.

We continue to make significant progress in both strategic thinking and performance evaluation and are pleased to present our third annual **balanced scorecard report** to the community. Within this document you can review our overall progress by examining the **Summary Report Card**. It focuses attention on a group of indicators that, when looked at together, provide a snapshot of the Society's overall performance.

Victoria Cool Aid Society has ably demonstrated in 2008/09 that our overarching objective to **optimize people, resources, and processes to improve the quality of life for at-risk citizens and our community** has been well met. Thanks to the energy and expertise of Cool Aid's staff and partners, combined with the generosity of our volunteers and donors, and the contributions of our funders, this past year we have been able to:

- provide over 50,000 shelter bed nights
- serve over 165,000 hot meals to shelter residents and drop-in clients
- break ground on our new purpose-built emergency shelter on Ellice Street
- deliver over 29,000 primary health and dental care appointments
- assist an average of 100 individuals each day on their paths to recovery, by providing a range of supports and services through REES (Resources, Education, Employment and Support)
- help 880 individuals to gain employment through our Casual Labour Pool
- begin the reconstruction of 713 Johnson Street to transform it into the ACCESS Health Centre
- lay the groundwork to expand our supportive housing stock by at least another 36 units

These highlights indicate that it is not just business as usual within Cool Aid. We are leading at least one major expansion initiative within each of our three areas of program delivery: emergency shelter, supportive housing, and community health services. These are highlighted in various ways throughout the report, most particularly within the section that speaks to **strategic priorities and initiatives**.

We measure performance in order to continuously improve. It is just as important that we also strive to continuously improve performance **measurement**. While the Society's balanced scorecard process is well established, there is still room for improvement and we will continue to fine-tune performance measures to ensure alignment with emerging priorities. Our ultimate goal through all of this is always to ensure that Cool Aid is providing the most effective programs and services to the vulnerable men and women whom we serve, bringing improvement to the quality of their lives and to our community.

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

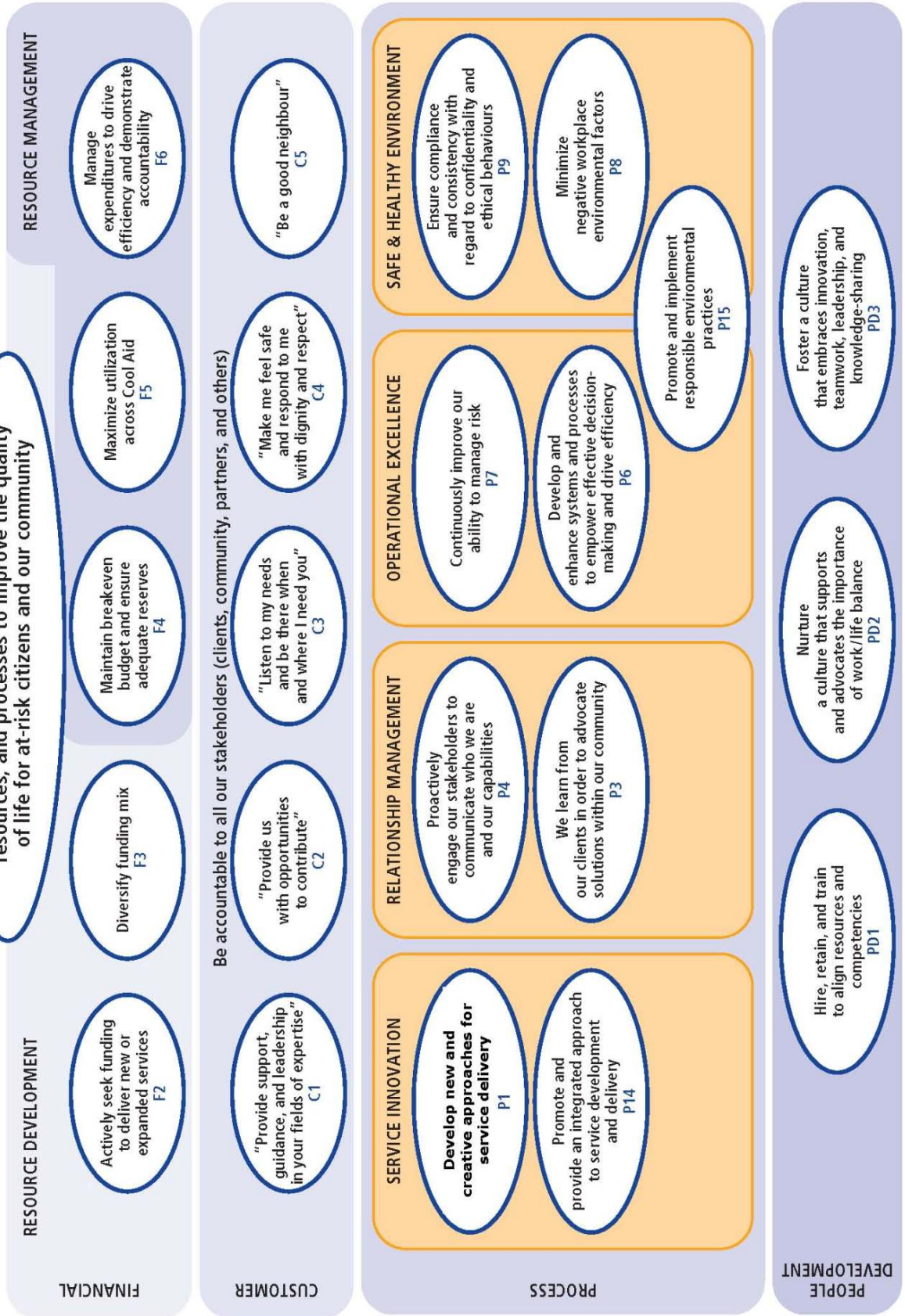
- We demonstrate reliability, good faith, and integrity in all our relationships.
- We foster a workplace culture that embraces innovation, teamwork, leadership, and knowledge-sharing.
- We make and keep our commitments.
- We are accountable for our actions and measure and share our contribution to the 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



	Objective	What we mean by this objective	Theme
Prime Objective			
	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
Financial Perspective			
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
Customer Perspective			
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
Process Perspective			
P01	Develop new and creative approaches for service delivery	Recognizing that we require the flexibility to respond to emerging clients' needs, we will develop new and creative approaches for service delivery.	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
People Development Perspective			
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

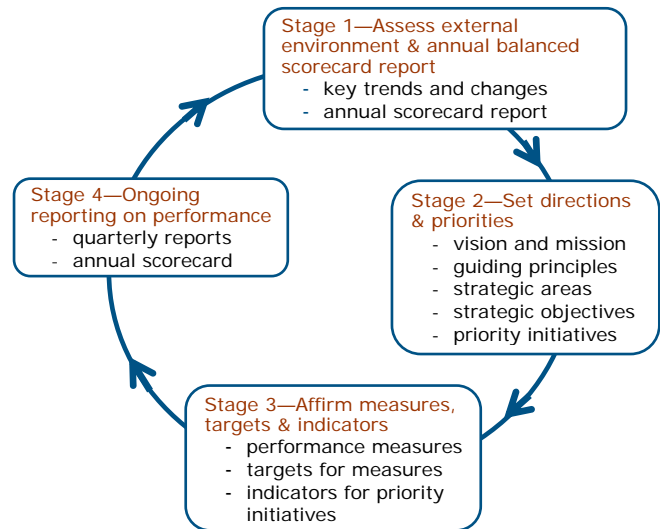
Strategic Priorities

Context

The framework Cool Aid uses to develop, organize and report on our strategic areas, strategic objectives, performance measures, targets and priority initiatives is the **balanced scorecard** (BSC).

Our strategic areas, strategic objectives, performance measures, targets and priority initiatives are reviewed annually, in the context of external changes, Cool Aid's overall performance, and other factors, following the four-stage planning cycle illustrated here.

Cool Aid's Annual Strategic Planning Process



Aligning Objectives and Priorities

In accordance with this annual cycle, the strategic objectives and priorities presented in the following **alignment matrix** were selected by Cool Aid management and affirmed by our Board of Directors as an appropriate response to the needs and issues identified in our 2008 environmental assessment.

These priorities have guided our efforts throughout the 2008/09 fiscal year and continue to do so in early 2009/10.

Priority Initiatives as identified September 2008

Complementing our matrix of strategic priorities and objectives, we also identified a number of specific initiatives as priorities over the next one to three years:

Initiative	Program Area
▶ Ellice Street project	Shelters
▶ ACCESS capital campaign	Health Services
▶ ACCESS building project	Health Services
▶ Olympic Vista Apartments	Housing
▶ Develop organizational capacity to manage growth	Agency-wide
▶ Develop a stakeholder input framework	Agency-wide
▶ Develop information management systems to support integrated information-sharing	Agency-wide

Looking Ahead

In September 2009, at the Board's annual orientation and strategic planning retreat, Cool Aid managers and Board members will reassess these priorities and initiatives in light of changes in the external environment as well as Cool Aid's overall performance in 2008/09.

Priorities over the next one to three years

as affirmed by the Board of Directors in Fall 2008,
with next scheduled review in September 2009

Financial	Customer	Process	People Development
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priority	Associated Objectives	Financial			Customer			Process					People Development		
		F02	F05	F06	C01	C03	C05	P01	P03	P04	P06	P14	PD01	PD02	PD03
1	Continue to respond to opportunities to increase housing stock for our target population	✓						✓	✓	✓					

- › Respond to immediate needs for shelter as opportunities arise (e.g., Ellice Street, Extreme Weather beds).
- › Pursue opportunities to increase low-barrier/supported housing (e.g., Gorge Road, Carey Road).
- › Look for other opportunities arising from the Greater Victoria Coalition to End Homelessness.
- › Promote Cool Aid Housing Program as best practice.

priority	Associated Objectives	Financial			Customer			Process					People Development		
		F02	F05	F06	C01	C03	C05	P01	P03	P04	P06	P14	PD01	PD02	PD03
2	Promote and provide internal and external service integration									✓	✓	✓			

- › Open the ACCESS Health Centre, a model for service integration.
- › Increase outreach and case management supports (e.g. Shelter client services workers and COOL outreach workers).
- › Develop information management systems to support integrated information-sharing.
- › Share expertise with the Greater Victoria Coalition to End Homelessness.

priority	Associated Objectives	Financial			Customer			Process					People Development		
		F02	F05	F06	C01	C03	C05	P01	P03	P04	P06	P14	PD01	PD02	PD03
3	Sustain our efforts to influence and educate stakeholders				✓	✓	✓		✓	✓					

- › Continue to play leadership roles within the community.
- › Work in partnership with new and existing groups (e.g. Cadillac Fairview, Chamber of Commerce, BGCA Board, Our Place Board).
- › Cultivate and preserve good neighbour relations (e.g., Ellice Street).
- › Develop a framework for eliciting stakeholder input.

priority	Associated Objectives	Financial			Customer			Process					People Development		
		F02	F05	F06	C01	C03	C05	P01	P03	P04	P06	P14	PD01	PD02	PD03
4	Continue to refine strategies for recruiting and retaining employees										✓		✓	✓	✓

- › Increase efforts to promote Cool Aid as an employer of choice.
- › Learn from current and departing employees.
- › Develop innovative healthy workplace strategies.
- › Look for ways to streamline manual processes and electronic systems.

priority	Associated Objectives	Financial			Customer			Process					People Development		
		F02	F05	F06	C01	C03	C05	P01	P03	P04	P06	P14	PD01	PD02	PD03
5	Improve internal systems to ensure organizational sustainability and service delivery integration		✓	✓							✓				✓

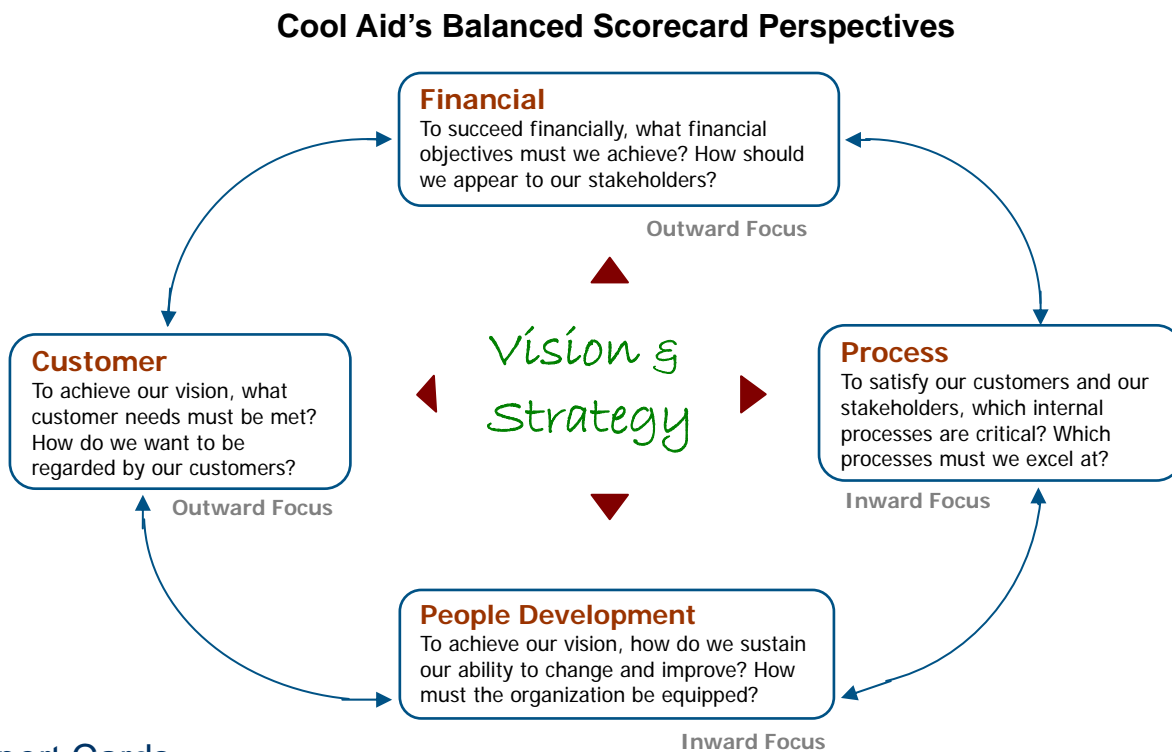
- › Refine service capacity and utilization indicators.
- › Look for additional cost savings and efficiencies.
- › Take steps to optimize the value of data as a key organizational resource.
- › Establish a consistent employee survey framework to assist with employee engagement.

Balanced Scorecard Perspectives

As conceived by Drs. Robert S. Kaplan and David P. Norton, the balanced scorecard (BSC) is a strategic planning and management framework, used to align business operations with vision and strategy, to communicate strategy internally and externally, and to monitor organizational performance against strategic objectives.

The four BSC perspectives—financial, customer, internal processes, and learning and growth (or, people development)—are intended to ensure that organizations take a balanced approach to strategic planning and performance measurement. For example, all organizations—whether in the business or non-profit sector—would identify and monitor *financial* and *non-financial* indicators of success.

Each BSC perspective is associated with strategic objectives, performance measures and targets, and initiatives, which are unique to each organization. All of Cool Aid’s strategic objectives and performance measures can be seen at a glance in the **summary report card**, which follows.



Report Cards

We monitor our progress towards objectives throughout the year, and report quarterly to our Board of Directors and annually to the community. In both types of reports, we use “report cards” to provide readers with a quick visual overview of our performance—the “big picture” so to speak.

In this report, we include two types of report cards. The **summary report card**, which follows, shows *annual* performance for every Cool Aid measure. In addition, for each of our four BSC perspectives, we use a **perspective report card** that shows 2008/09 performance by quarter for a subset of measures.

Financial Perspective		2007/08	2008/09
F02	Actively seek funding to deliver new or expanded services or programs Measure F02-1: Variance between additional funding received versus identified need	✓	✓
F03	Diversify funding mix Measure F03-1: Funds from new sources	■	✓
	Measure F03-2: Innovations in funding diversification	■	■
F04	Maintain breakeven budget and ensure adequate reserves Measure F04-1: Percent variance from budget	◇	◇
	Measure F04-2: Percentage of capital asset funding needs that are being met by Cool Aid	■	◇
F05	Maximize utilization across Cool Aid Measure F05-1: Service utilization	✓	✓
F06	Manage expenditures to drive efficiency and demonstrate accountability Measure F06-1: Accountability performance	■	■

Customer Perspective		2007/08	2008/09
C01	"Provide support, guidance and leadership in your fields of expertise" Measure C01-1: Our participation in knowledge-sharing and leadership opportunities	✓	✓
C02	"Provide us with opportunities to contribute" Measure C02-1: Our success at creating meaningful opportunities to contribute	✓	✓
C03	"Listen to my needs and be there when and where I need you" Measure C03-1: Whether we meet our commitments to listen to our customers and respond appropriately	✓	◇
C04	"Make me feel safe and respond to me with dignity and respect" Measure C04-1: Client satisfaction with safety and relationships with agency staff	■	■
C05	"Be a good neighbour" Measure C05-1: Our performance in acting as good neighbours	✓	✓

Process Perspective		2007/08	2008/09
P01	Develop new and creative approaches for service delivery Measure P01-1: Innovative approaches to service delivery and service expansion	✓	✓
P03	We learn from our clients in order to advocate solutions within our community Measure P03-1: Progress in advocating for clients with decision-makers	✓	✓
P04	Proactively engage our stakeholders to communicate who we are and our capabilities Measure P04-1: Proactive communication initiatives	✓	✓

Process Perspective (cont'd)		2007/08	2008/09
P06	Develop and enhance systems and processes to empower effective decision-making and drive efficiency (New performance measures are in development)	■	■
P07	Continuously improve our ability to manage risk Measure P07-1: Risk management actions undertaken	✓	✓
P08	Minimize negative workplace environmental factors 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	Ensure compliance and consistency with regard to confidentiality and ethical behaviours (New performance measures are in development)	■	■
P14	Promote and provide an integrated approach to service development and delivery (New objective adopted in 2007/08; measures in development)	■	■
P15	Promote and implement responsible environmental practices (New objective adopted in 2007/08; measures in development)	■	■

People Development Perspective		2007/08	2008/09
PD01	Hire, retain, and train to align resources and competencies Measure PD01-1: Internal hires (transfers and promotions)	■	■
	Measure PD01-2: Turnover rate for casual staff	◇	◇
	Measure PD01-3: Turnover rate for permanent staff	✓	✓
	Measure PD01-4: Exit survey indicators	■	✓
PD02	Nurture a culture that supports and advocates the importance of work/life balance Measure PD02-1: Workplace stressors	✓	✓
	Measure PD02-2: Progress in mitigating workplace stressors	■	■
PD03	Foster a culture that embraces innovation, teamwork, leadership, and knowledge-sharing 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	■	◇

FINANCIAL PERSPECTIVE

About This Perspective

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

Performance Synopsis

Our audited year-end financial statement indicates that Cool Aid's overall financial position remained strong and well-managed in 2008/09.

Total 2008/09 revenues were \$13.7 million, up 14.7% over 2007/08, enabling us to provide a wider range of services. One example: enhanced case management support for Shelter clients.

We achieved significant success with our resource development initiatives (measures F02-1 & F03-1), despite the global economic recession that began in the 3rd quarter.

We ended the year with a surplus of \$267,751, representing 1.9% of budgeted revenues, which exceeds our breakeven target of 1% (measure F04-1).

Services at our shelter, housing and health facilities operated at or very close to full capacity (measure F05-1).

We did not meet our goal to develop a capital asset management plan in 2008/09 (measure F04-2).

Perspective Report Card						
Measure	2008/09				Annual	
	Q ₁	Q ₂	Q ₃	Q ₄	07/08	08/09
F02-1	✓	✓	✓	✓	✓	✓
F03-1	✓	✓	✓	✓	■	✓
F03-2	■	■	■	■	■	■
F04-1	◇	◇	◇	◇	◇	◇
F04-2	◇	◇	◇	◇	■	◇
F05-1	✓	✓	✓	✓	✓	✓
F06-1	✓	✓	■	■	■	■

See the Summary Report Card (page 11) for descriptions of these Financial measures.

Resource Development Objectives

Among its impacts, the global recession severely curtailed funding availability, affecting Cool Aid in the third and fourth quarters of 2008/09 (and expected to continue into the new fiscal year). While virtually every sector was affected, the impact on foundation and corporate philanthropy was especially evident. Despite this economic reality, Cool Aid ended 2008/09 with some significant successes and growth in contributions.

Objective F02

Actively seek funding to deliver new or expanded services or programs

In light of the economic environment in 2008/09, significantly more effort was required to achieve positive outcomes but the results speak for themselves.

Key projects supported by successful funding proposals in 2008/09 included:

- ACCESS Health Centre
- Olympic Vista supportive housing
- 40th Anniversary
- Every Step Counts

Thinking ahead:

- Our 2009 purchase of a Cedar Grove property, formerly leased, positions Cool Aid strongly for the future. The property has considerable redevelopment potential. Now that Cool Aid owns the land, we have the ability to act quickly when the opportunity arises.

**STRATEGIC
PRIORITY**
#1

Objective F03

Diversify funding mix

Total contributions more than tripled to \$270K.

Online donations grew by 77%.

Contributions by individual donors grew six-fold in 2008/09 while contributions by organizations increased 93%.

The number of monthly donors quadrupled compared to 2007/08.

Contributions in 2008/09: Historically, donations and grants have not accounted for a significant proportion of Cool Aid revenues, generally less than 1%. In future years, we anticipate that contributions will grow, in both absolute and relative terms.

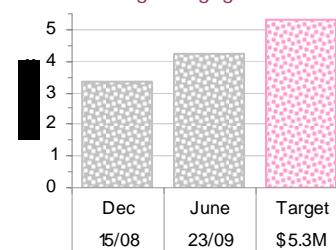
There is good reason to be optimistic even in the midst of the economic recession, as the highlights to the left illustrate. While the economy declined, virtually all sources of contributions to Cool Aid increased in 2008/09 compared with 2007/08, with online, monthly and individual contributions showing especially strong growth.

Fundraising innovations: These outcomes

are due, in part, to several new fundraising initiatives launched in 2008/09. These include two direct mail drives—a first for Cool Aid—(with at least three mailings planned for 2009/10), establishment of an endowment fund with the Victoria Foundation, and the ramping up of our capital campaign for the new ACCESS Health Centre.

ACCESS capital campaign: This campaign—another first for Cool Aid—was a multi-pronged effort. In addition to strategically focused funding proposals, the campaign included cultivating relationships with potential large donors, cross-promotion with various 40th Anniversary initiatives, and a highly successful “foundation event,” which raised \$68,000 from staff and Board directors at Cool Aid and AIDS Vancouver Island, our partner for ACCESS—28% above our target.

ACCESS Capital Campaign
80% of the way to being mortgage-free



Resource Management Objectives

Objective F04

Maintain breakeven budget and ensure adequate reserves

Measure F04-1: Percent variance from budget

Our fiscal year closed with a surplus of \$267,751. Representing 1.9% of budgeted revenues, this surplus exceeds our breakeven target, currently set at 1% (measure F04-1). As part of our annual strategic review, we will be reassessing the target for this measure, which may be set too low relative to our total budget.

Objective F05

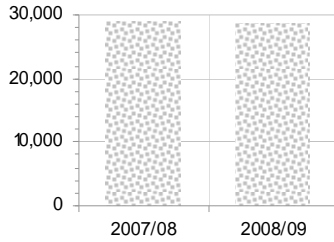
Maximize utilization across Cool Aid

To monitor and report on service utilization, Cool Aid employs a number of indicators appropriate to each service. Three examples are shown on the next page.

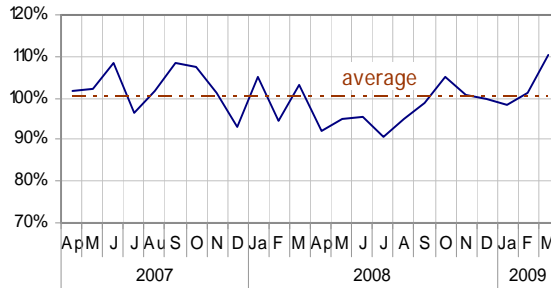
The bottom line for 2008/09: All Cool Aid services and facilities operated at or very close to capacity throughout the fiscal year.

STRATEGIC
PRIORITY
#5

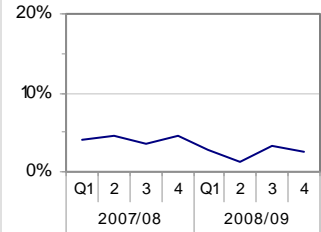
Medical & dental encounters:
Community Health Centre



Shelter occupancy rates at Streetlink,
Cool Aid's largest shelter



Average vacancy rate:
All housing facilities



Objective F06

Manage expenditures to drive efficiency and demonstrate accountability

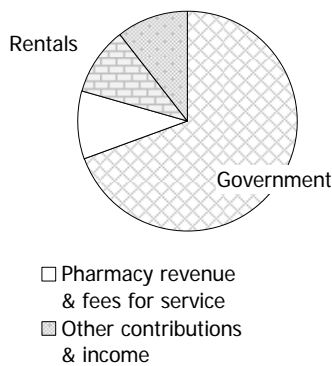
STRATEGIC
PRIORITY
#5

Key accomplishments in 2008/09:

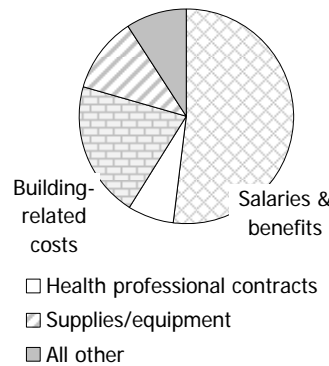
- Our Finance department was reorganized with more clearly defined roles. Similar job functions were placed within a single position rather than being spread among two or three positions.
- Our payroll system was upgraded to allow for more automated expense allocations, significantly reducing data entry and the risk of errors. An added benefit: the reduction of paper usage, resulting in cost savings and less environmental impact, as paystubs are now emailed in a secure format.
- Financial policies and procedures have been improved to better account for certain transactions (examples include replacement reserves, pharmacy supplies, dental).
- Financial reporting is now more detailed and accounts/categories are better defined.

We also significantly reduced paper usage by printing system-generated reports to PDF format (thousands of pages) and not printing pages that are not necessary (such as monthly cover sheets). As much as possible, double-sided printing is being strongly encouraged.

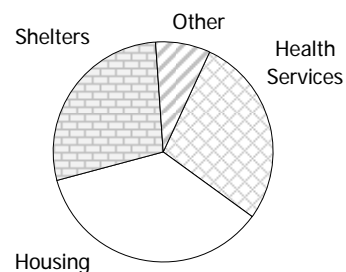
Main Sources of Revenue



Expenditures by Category



Expenditures by Program



CUSTOMER PERSPECTIVE

About This Perspective

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

Performance Synopsis

Our performance in 2008/09 on all five Customer objectives was equally strong.

For three objectives—C01, C02, C05—we can *demonstrate why* we rated our performance as strong. For objectives C03 and C04, however, we recognize that information management improvements are needed before we can fully demonstrate our confidence in our performance.

We undertook our first stakeholder survey, directed at our funders and community partners—and gained valuable insights into how others view us.

Perspective Report Card						
Measure	2008/09				Annual	
	Q ₁	Q ₂	Q ₃	Q ₄	07/08	08/09
C01-1	✓	✓	✓	✓	✓	✓
C02-1	✓	✓	✓	✓	✓	✓
C03-1	✓	✓	◇	◇	✓	◇
C04-1	■				■	■
C05-1	✓	✓	✓	✓	✓	✓

See the Summary Report Card (page 11) for descriptions of these Customer measures.

Objective C01

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

STRATEGIC
PRIORITY
#3

As a result of Cool Aid's first stakeholder survey, we now have independent confirmation, from our funders and community partners, that Cool Aid has established a solid track record in client advocacy, knowledge-sharing, collaboration, and leadership.

Key accomplishments in 2008/09:

- Cool Aid was well-represented on the Greater Victoria Coalition to End Homelessness (GVCEH). Both management and members of the Board worked closely with other Coalition members to lay the foundations for an effective multi-partner agency.
- Cool Aid's Executive Director was elected to the Board of the B.C. Non-Profit Housing Association as a director-at-large for a 3-year term.
- A stakeholder dialogue with Literacy Victoria led to a literary program being introduced at all three Cool Aid shelters; the program includes onsite teaching and reading support.
- "Trauma & Healing: Choice, Change & Empowerment through Recovery" was the theme for this year's sold-out annual REES partnership conference.

Results from Cool Aid's funder and partner survey	
Leadership	Knowledge-Sharing & Advocacy
<p>When asked if they saw Cool Aid as a "go to" source for information in several areas, respondents answered "yes" as follows:</p> <ul style="list-style-type: none"> ▪ Emergency shelter: 97%. ▪ Inner-city health care: 91%. ▪ Supportive housing: 90% ▪ Homelessness issues in general: 89%. <p>Fewer answered "yes" on HOUSING FIRST (82%), OUTREACH SERVICES (72%), and HARM REDUCTION (61%).</p>	<p>Asked to rate Cool Aid's track record in knowledge-sharing and advocacy, respondents chose "good" or "excellent" as follows:</p> <ul style="list-style-type: none"> ▪ Advocates for marginalized people with decision-makers: 90%. ▪ Shares expertise with others: 88%. ▪ Shares information with others: 86%. <p>75% of respondents rated Cool Aid as "good" or "excellent" on being RECEPTIVE TO LEARNING FROM OTHERS.</p>

Thinking ahead:

- 90% of respondents to our funder and partner survey rated Cool Aid as “good” or “excellent” on our *overall* performance as a community partner.

When asked about *specific* partnering attributes, however, the good-or-excellent ratings are all consistently lower—ranging between 54% and 81% (with a relatively high proportion choosing “don’t know” for some attributes).

Content analysis of open-ended responses (underway at the time of writing) may shed light on whether there are specific areas for improvement.

Results from Cool Aid's funder and partner survey				
Partnering & Collaboration	good or excellent	fair or poor	don't know	
Pulls own weight in collaborative efforts	81%	6%	14%	100%
Supports initiatives sponsored by other agencies	77%	11%	11%	100%
Honours commitments made to partners	75%	6%	19%	100%
Shares the spotlight with partners	75%	15%	10%	100%
Willing to consider alternative viewpoints	65%	15%	19%	100%
Receptive to compromises proposed by partners	63%	13%	24%	100%
Acts on constructive criticism	54%	8%	38%	100%
Overall, how would you rate Cool Aid's performance as a community partner?	90%	7%	3%	100%

Objective C02

“Provide us with opportunities to contribute”

Key accomplishment in 2008/09:

- The unqualified success of Cool Aid’s Arts Festival would not have been possible without the hundreds of hours that individuals contributed to the planning and preparations for the event as well as the many donations of both goods and services from individuals, local businesses, and other community partners.

On Festival Day itself, some 150 volunteers helped out, including dozens of visual and musical artists. Of the 39 visual artists and 28 stage acts and emcees, most were former or current Cool Aid clients and staff.

- We compiled a client participation “inventory” that documents, for the first time, the full range of ways in which Cool Aid clients are involved in—and provided opportunities to contribute to—day-to-day operations as well as program development.

Thinking ahead:

- Currently, data limitations constrain our ability to assess the effectiveness of client opportunities to contribute. The fore-mentioned client participation inventory will be a useful reference as we consider sustainable strategies for both monitoring and enhancing client involvement.

Objectives C03 & C04

“Listen to my needs and be there when and where I need you”

“Make me feel safe and respond to me with dignity and respect”

STRATEGIC
PRIORITY

#3

The main challenge of these two objectives is not in meeting them, but in *demonstrating* how well we meet them by means of hard data.

Much of what we do to work toward these objectives is part of day-to-day client-staff interactions, and includes frequent focus groups and client meetings. The results of these interactions are rarely documented, however. *We* know we are doing a good job on these objectives, based partly on verbal and written client feedback, feedback from front-line staff, and the number of formal complaints (very few) we receive—but we also recognize that, to be accountable to both our clients and our funders, we need more substantive data.

Key accomplishments in 2008/09:

- Health Services undertook a comprehensive survey of clients of the medical clinic late in the year, in order to identify new or changing needs and determine the quality of clients' experiences at the clinic. Survey results were still undergoing analysis at the time of writing.

Thinking ahead:

- The client participation inventory described under objective C02 will also serve as a valuable source as we examine options for more systematically capturing client feedback. That examination will be one dimension of the stakeholder input framework discussed under Process objective P03.

Objective C05

"Be a good neighbour"

STRATEGIC
PRIORITY
#3

In the vast majority of cases, we believe—and our neighbours seem to concur—that we are a very good neighbour. Most Cool Aid facilities blend seamlessly into their communities. Complaints or issues arise rarely and are promptly addressed.

There is, however, one neighbourhood where, despite our most diligent efforts, perceptions remain mixed: the Swift and Store Street area where Cool Aid currently has several services, including the Streetlink shelter.

Key accomplishments in 2008/09:

- Cool Aid initiated discussions with local businesses on shared security for the Swift/Store area. The fiscal year ended with considerable optimism that a joint security arrangement would become reality in 2009/10.
- In consultation with Ellice/Rock Bay businesses and residents, the drafting of a Good Neighbour Agreement for our Ellice Street shelter began. We look forward to continued progress toward a formal agreement during 2009/10.
- Excellent relations continued throughout the year with our neighbours in North Park, where our Next Steps Transitional Shelter is located.
- Cool Aid has been an active participant in the Johnson Street Stakeholders group, formed when Our Place occupied the building that will now be the ACCESS Health Centre. Throughout reconstruction, we have kept members apprised on our progress every step of the way, including tours of the evolving site.

Thinking ahead:

- We started preliminary consultations with the Community Association Forum of the Mount View neighbourhood in 2008/09, regarding Cool Aid's new 36-unit Olympic Vista Apartments project (construction to start January 2010). Those consultations will continue in 2009/10.
- Over the next two years, Cool Aid's footprint in the Store/Swift area will change, starting with the move of our Swift Street health and dental clinics into the new ACCESS Health Centre on Johnson Street (Sept. 2009). In late 2010, when our new shelter opens on Ellice, Streetlink will begin its transformation into permanent housing, as an extension of our long-established Swift House Apartments.

PROCESS PERSPECTIVE

About This Perspective

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

Performance Synopsis

Cool Aid celebrated its 40th Anniversary in 2008 with an Arts Festival, the production of a short documentary, and the writing of our history—initiatives that brought together former and current clients, staff, businesses, and community members.

The 2008/09 fiscal year saw the introduction of a new program—Every Step Counts—as well as several new ways of delivering services to our clients.

We further reinforced our commitment to the mission of the Greater Victoria Coalition to End Homelessness by establishing an in-house working group to examine service integration internally and with our many community partners.

We laid the groundwork for a stakeholder input framework—an initiative we identified as a priority in our 2007/08 report—and made progress in the information management sphere in several ways.

Perspective Report Card						
Measure	2008/09				Annual	
	Q ₁	Q ₂	Q ₃	Q ₄	07/08	08/09
P01-1	✓	✓	✓	✓	✓	✓
P03-1	■	■	✓	✓	✓	✓
P04-1	✓	✓	✓	✓	✓	✓
P06-x	■	■	■	■	■	■
P07-1	✓	✓	✓	✓	✓	✓
P14-x	■	■	■	■	■	■

See the Summary Report Card (pages 11- 12) for descriptions of these Process measures.

Objective P01

Develop new and creative approaches for service delivery

STRATEGIC
PRIORITY
#1

Key accomplishments in 2008/09:

- **Every Step Counts:** The result of a collaboration between Cool Aid, the Victoria Foundation and Frontrunners Victoria, this running program matches youth and adult “recruits”—people facing challenges related to homelessness, mental health, addictions, and other issues—with skilled running coaches who act as peer mentors. In addition to physical and mental health benefits related to regular exercise, the program aims to provide a support network for homeless people, in part by bringing together key community organizations.



The program started recruiting in early 2009 and had a total of 30 participants by the end of March, ranging in age from 22 to 65. Initial feedback from the first recruits has been very positive.

- **From space crunch to outreach:** Every square metre at Cool Aid’s Swift Street medical clinic is used to capacity—and sometimes beyond, making service expansion a real challenge. When offered a new nurse practitioner by the Vancouver Island Health Authority, the clinic found a way to provide services *off-site*, by identifying an under-served group—aboriginal women needing access to female practitioners for routine examinations and consultations in a safe environment.

The nurse practitioner now alternates with one of the clinic’s doctors to make weekly visits to two fairly isolated South Island communities as well as the Victoria Native Friendship Centre. Cultivating these relationships has also led to other service delivery opportunities, such as providing group education to women on various health topics. In addition, weekly clinic time is being provided for youth who attend drop-in activities at the Friendship Centre, a service the clinic hopes to be able to expand in future.

- **Client services workers:** In late 2007/08, Cool Aid's Shelter program hired its first client services workers (CSWs). After a full year in place, the CSWs have built relationships with shelter clients that have resulted in almost 300 men and women being connected with housing and other supports.

Thinking ahead:

- **"Thrifty" service expansion:** A new partnership between Beacon Community Services (BSC) and Cool Aid's REES program will strengthen program synergies and expand REES's employment-related services, at a modest cost. The two agencies will jointly operate a thrift shop, opening summer 2009, in a retail space made available by BC Housing. Located on the ground floor of Desmond House, one of Cool Aid's housing facilities, the thrift shop will be staffed by BCS employees and volunteers recruited from the REES program, Cool Aid tenants, and users of other Cool Aid services.

Anticipated benefits to volunteers include on-the-job training, discounts on merchandise, future retail training skills program certification, and more, in a safe, meaningful and respectful environment.

Objective P03

We learn from our clients in order to advocate solutions within our community

STRATEGIC
PRIORITY
#1, 3

We did not accomplish our 2008/09 goal for this objective—to develop a stakeholder input framework—but we did make significant progress toward it:

- Our 2009 survey of funders and partners—our first stakeholder survey—yielded valuable information on how others perceive our strengths and weaknesses in such strategic areas as organizational leadership, partnering and collaboration, knowledge-sharing and advocacy, and accountability and transparency. Key results from the survey will be brought forward for discussion at our Board of Directors annual retreat in September 2009.
- In addition to insights directly related to our strategic performance, we learned valuable lessons about the *process* of undertaking a survey—from design through analysis and reporting—lessons that will be applicable to future surveys.

In retrospect, the goal to develop a stakeholder input framework within a single year was unrealistic. The policies, guidelines, processes and schedules of such a framework are probably best developed incrementally, informed by experiences such as our funder and partner survey, rather than developed in a vacuum.

Thinking ahead:

- Eliciting frequent client feedback is part of the way Cool Aid operates. Where we need to make improvements is in *capturing* that feedback so that it can be shared, quantified, and compared over time.
- Our funder/partner survey was just the first in what will be an ongoing series of initiatives to regularly elicit feedback from the whole spectrum of stakeholders, which include clients, employees, donors, volunteers, neighbours, and others. Those initiatives *may* take the form of surveys, but we will also be examining other alternatives that are less resource-intensive than surveys.

Objective P04

Proactively engage our stakeholders to communicate who we are and our capabilities

STRATEGIC
PRIORITY
#3

Much of 2008/09 was devoted to two broad themes: Cool Aid's 40th Anniversary and the vision of the new ACCESS Health Centre.

Key accomplishments in 2008/09:

- **40th Anniversary Arts Festival:** About 2,000 people attended this all-day celebration in Centennial Square. Cool Aid clients and staff were among those featured in 21 stage acts and the works of 39 visual artists.



Two indicators of success: The August 2008 festival received excellent media coverage, both before and after the event. A number of attendees expressed their hope that Cool Aid would host this event *annually*.

- **ACCESS Health Centre:** AIDS Vancouver Island and Cool Aid jointly launched the new ACCESS website—www.ACCESSHealthCentre.ca—in November 2008. In addition to information on the vision behind the new health centre, the new site accepts online donations.



Much of the ACCESS capital campaign focuses on strengthening existing relationships and cultivating new relationships. As part of that process, we gave dozens of guided “hard-hat” tours of the health centre undergoing renovations at its new Johnson Street location—each one of them an opportunity to share the vision of integrated health services as well as to raise awareness of Cool Aid’s overall services and the needs of marginalized people.

- **Homelessness Action Week:** Our large display at the Bay Centre, staffed by volunteers the whole week, was a good awareness builder for Cool Aid and the services we provide. We also received good press from our participation in the Seeing is Believing tour, and made valuable new contacts in the business community.
- **Annual General Meeting:** In line with the theme of our 2008 AGM—Helping our Community End Homelessness—Mayor Alan Lowe and the Honourable Ted Hughes, co-chairs of the Greater Victoria Coalition to End Homelessness, were the keynote speakers. Hosted at Cool Aid’s Downtown Community Activity Centre, the AGM was well-attended and received good media coverage.
- **Coalition Communications Working Group:** As our 40th Anniversary activities wound down, we expanded our participation in the Greater Victoria Coalition to End Homelessness to include representation on this new working group tasked with developing integrated communication strategies for the multi-partner agency.

Thinking ahead:

- **Cool Views:** At least two issues of *Cool Views*, Cool Aid’s new magazine, are planned for 2009/10. The magazine will enable us to share news about Cool Aid, on a timely basis, with a range of stakeholders, with particular emphasis on our volunteers, employees, clients, donors, and prospective contributors.
- **Cool Aid documentary and history:** While most of the work on these two 40th Anniversary projects occurred in 2008/09, the final products were released later in 2009.
- **Key publications:** As a result of feedback from our funder and partner survey, we will be reviewing Cool Aid’s main website and key publications like our annual report and annual report card, to identify ways to improve the reach and quality of these important communication tools.

Results from Cool Aid’s funder and partner survey

Accountability & Transparency

A surprisingly high proportion of respondents said they were “not at all familiar” with some of Cool Aid’s key publications:

- 74% – Report card on strategic performance
- 58% – Annual financial statements
- 44% – Annual report
- 43% – Brochures on programs and services

Clearly, we have some work to do in this area.

Objective P14

Promote and provide an integrated approach to service development and delivery

STRATEGIC
PRIORITY
#2

Reducing barriers, improving accessibility, connecting clients to services, whether inside or outside Cool Aid, have long been part of our service delivery model, aptly captured by the phrase “Every door is the right door.”

Improving service integration between agencies is also a cornerstone of the Greater Victoria Coalition to End Homelessness (GVCEH), in which Cool Aid is very involved and strongly committed.

For a multi-service agency like Cool Aid, optimal service integration requires not only that we work closely with our community partners but also that we re-examine our own continuum of services to identify possible barriers to and opportunities for better integration, as well as to ensure strong alignment with the priorities and initiatives of our GVCEH partners.

Key accomplishments in 2008/09:

- To guide this internal examination and help ensure GVCEH alignment, we formed a new Integration Working Group in late 2008/09, which includes representatives from each Cool Aid program area and is chaired by our manager of Health Services.
- In addition to our work on various GVCEH committees, Cool Aid staff are also involved in building working relationships with new external teams such as VIHA's Victoria Integrated Community Outreach Team (VICOT), the Assertive Community Treatment (ACT) teams, and other inner-city and outreach teams.

Thinking ahead:

- To support productive future discussion of service integration, Cool Aid's Integration Working Group began two initiatives in 2008/09 that will be further developed in 2009/10:
 - the development of a client point-of-entry flow chart, to help identify possible barriers to and opportunities for better integration of services, and
 - the compilation of all forms and data-tracking methods currently used to capture client intake and exit information.
- The Integration Working Group also identified a number of topics to be explored internally and/or with our community partners in 2009/10 and beyond, among them:
 - information sharing, information sharing tools, consent and privacy issues
 - ways to elicit client input
 - implications for staffing (e.g., centralized orientations)
 - how to ensure appropriate client follow-up
 - types of clients at risk of falling through the cracks
 - measuring and demonstrating outcomes
 - funding options for potential projects
- The new ACCESS Health Centre, opening Fall 2009, represents a powerful synergy of agency and government primary health care and social support providers, housing as it will a spectrum of integrated health and social services where “every door is the right door.”



Currently, ACCESS combines the energy of Cool Aid's Community Health Centre, AIDS Vancouver Island, and the Vancouver Island Health Authority. Space permitting, we hope to be able to include other service providers as partners in future.

Objective P06

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

STRATEGIC
PRIORITY
#2, 4, 5

Key accomplishments in 2008/09:

- We ended the fiscal year by launching our first funder and partner survey, the purpose of which was to gain insight into how our funders and partners view Cool Aid in such strategic areas as leadership, collaboration, and accountability. A total of 113 individuals from 65 organizations were invited to participate; 77 participants responded—a response rate of 68%!
- While developing the funder/partner survey, we realized that the survey application we were using (SurveyMonkey) had much wider potential than simply for online surveys. We subsequently used it to enter, aggregate, and report on responses to two ongoing HR surveys—our exit survey and 60-day new hire survey—tasks accomplished very quickly, thereby allowing us more time to devote to analysis.

Like any organization, Cool Aid relies on forms of all kinds. At least some of these forms could be made available online, an option we will be exploring over the next two years.

- Improvements in data accessibility enabled us to become more sophisticated in how we use—and communicate—quantitative data. The data graphics incorporated into this report are one example of this.

While we have just scratched the surface, using and communicating data *visually* has already yielded better insights into historical *patterns* and led to new and different types of questions being asked.

Cool Aid made some significant progress in the area of information management during 2008/09. But we will need to take much bigger steps in 2009/10 and beyond. Continued growth in staff, locations, services, and clients—together with our commitment to improve service integration internally *and* externally—requires that we formally assess our information needs as an organization and as a community partner.

Thinking ahead:

- Cool Aid is at a crossroads: New information requirements as well as information gaps are being identified with increasing frequency. To help us make sound decisions about future commitments of time and money, the development of a formal **information management plan** (IMP) will be a priority in the time ahead. Information needs, processes and policies (information sharing and client confidentiality, for example), and tools (software) are the broad areas that the IMP will need to address.
- As Cool Aid continues to become more geographically dispersed, we may also need to rely on technology more in order to sustain the collaborative culture we have built up over the last four decades. Video conferencing for internal meetings, “groupware” that enables people to collaborate without being on site, and a different type of staff intranet are some of the options to consider.
- While some results from our funder and partner survey have been cited in this report, there is much of value still to be gleaned. Our analysis of open-ended comments as well as cross-tab analysis, underway at the time of writing, will undoubtedly yield additional insights. The lessons we learn from this survey will be incorporated into our ongoing strategic planning process.

PEOPLE DEVELOPMENT PERSPECTIVE

About This Perspective

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

Performance Synopsis

2008/09 was an exceptional year for staff training and development, with strong staff participation in such opportunities as job shadowing, shared learning, and managing aggressive behaviours.

Retention of permanent staff stabilized in the last two quarters of the fiscal year, while retaining casual staff continues to be a challenge.

- The annualized turnover rate for casual staff in 2008/09 was 40% (measure PD01-2), which compares favourably with 50% in the social services sector overall.
- For permanent staff, Cool Aid's annualized turnover rate was 10% (measure PD01-3), compared with an average of 14% for the social services sector.

"Learning from our staff" will be a prominent theme over the next two years, as we build the infrastructure to more systematically capture and respond to staff input on such subjects as job satisfaction, workplace environment, work/life balance, program development ideas, and service integration.

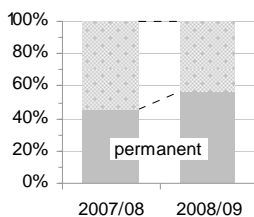
Perspective Report Card						
Measure	2008/09				Annual	
	Q ₁	Q ₂	Q ₃	Q ₄	07/08	08/09
PD01-1	■	■	■	■	■	■
PD01-2	✗	✗	✓	◇	◇	◇
PD01-3	◇	◇	✓	✓	✓	✓
PD01-4	■	■	■	■	■	■
PD02-1	■	■	■	■	■	■
PD02-2	■	■	■	■	■	■
PD03-1	■	■	■	■	■	■
PD03-2	◇	◇	◇	◇	◇	◇

See the Summary Report Card (page 12) for descriptions of these People Development measures.

Staff Demographics

Total staff: At the close of 2008/09, Cool Aid had 219 employees, an increase of 18 employees or 9% over the previous fiscal year. The increase is limited to permanent employees, which increased by 27% over 2007/08 compared with the number of casual (relief) staff, which dropped by 17%.

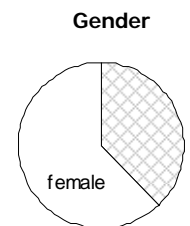
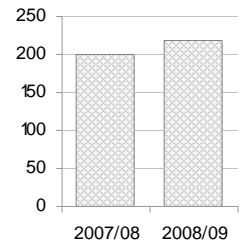
Permanent staff increased while casual staff declined

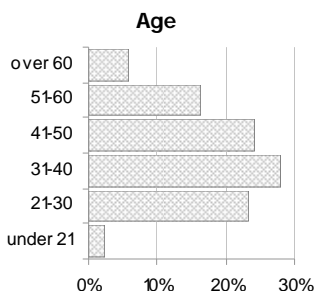


Permanent vs. casual staff: As a result, there was a notable shift in the relative proportions of permanent to casual staff. Compared to 2007/08, permanent employees increased from 59% to 68% of total staff in 2008/09, while casual employees fell from 41% to 32% of staff.

Gender: In 2008/09, women accounted for 62% of Cool Aid staff, men 38%, about the same proportions as in the previous fiscal year.

Number of Employees





Age: As at March 2009, almost half (47%) of Cool Aid employees were over the age of 40. Over the next few years, the number of staff over 60 years old—13 employees in 2008/09 (6% of staff)—could potentially triple.

Tenure: Preliminary analysis suggests that Cool Aid’s workforce is disproportionately weighted in two tenure categories: employees with less than one year of work experience at Cool Aid and those with 10 or more years of experience. Underrepresented are staff with two to nine years of work history at the agency.

Objectives PD01, PD02 & PD03

Hire, retain, and train to align resources and competencies

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

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

**STRATEGIC
PRIORITY**
#4, 5

Key accomplishments in 2008/09:

- **Online recruiting:** Our website has become an important recruiting tool. The Employment page is now the most popular destination on the site, due in part to the introduction of “Featured Jobs” right on our homepage. In addition, applications for Cool Aid positions can now be submitted directly from the site.

- **Hiring process:** We streamlined the job application process and introduced new procedures, which have accelerated response time to applicants.

Response time was one area for improvement arising out of a preliminary analysis of Cool Aid’s 60-day new hire survey results. Overall, respondents gave the hiring process high marks.

- **Job evaluation:** We reviewed the job evaluation process for non-unionized (exempt) positions and implemented a number of improvements such as reducing the number of pay bands (from 31 to 12) and pay steps (from 6 to 4) in the salary grid.

We also benchmarked several key unionized positions to ensure that our pay scales are in alignment with those of other organizations for similar positions.

- **Staff Development:** In 2008/09, 64 staff—both new and experienced employees—participated in Managing Aggressive Behaviours (MAB), a collaborative in-house full-day training workshop.

While the primary purpose of MAB workshops is to keep staff safe, the collaborative environment also helps build greater awareness of which factors are similar or different in various Cool Aid programs and sites and encourages the building of cross-program working relationships.

“Very informative and valuable”
— participant in a Managing Aggressive Behaviours workshop

- **Information management:** We laid the foundations for more analytic and more accessible HR reporting during the fiscal year by launching several initiatives aimed at improving data consistency, ensuring data quality over time, and developing the type of historical data that will more easily enable us to identify and respond to trends.

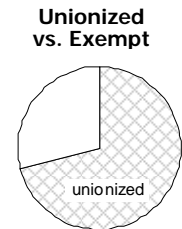
This groundwork is still ongoing but we are already visualizing enhancements to existing HR reports as well as new information products to support our People Development objectives.

Thinking ahead:

- **Internal talent:** In late 2008/09, we introduced a new performance measure (PD01-1), intended to help us monitor the degree to which we fill positions from within and whether we promote internal talent appropriately. We are in the process of developing the data to support this measure and anticipate being able to report on performance in our 2009/10 report.

Promoting from within is a sensible retention strategy but we anticipate other benefits as well: Clearly articulating the strategy and systematically encouraging internal applications will also contribute to sustaining Cool Aid's unique culture (objectives PD02 & PD03).

- **Recruiting externally:** During 2009/10, we will examine potential strategies for promoting Cool Aid as an employer of choice. As part of that process, we plan to expand existing partnerships with several organizations.
- **Staff development:** In 2009/10 we will be introducing an agency-wide orientation sessions for new employees, to help promote awareness of the full scope and variety of services Cool Aid provides. These sessions will also be an opportunity to directly interact with program managers within the first few months of employment.
- **Collective bargaining:** Our existing collective agreement will expire on March 31, 2010. Bargaining for a new collective agreement was already in progress at the time of writing and will continue through the fall and winter of 2009. We will need to be mindful of emerging labour issues and challenges.
- **Greying workforce:** As is true of many organizations, Cool Aid's workforce is aging. To ensure future organizational sustainability, retirement planning and succession planning will play an increasingly more important role over the next five years.
- **Pension changes:** A new pension plan comes into effect on March 31, 2010. Training, education and enrolment for the new plan will be a major HR initiative during 2009/10.
- **Learning from our staff:** Developing a *sustainable* infrastructure to regularly elicit, analyze, report and respond to staff feedback is an important component of Cool Aid's stakeholder input framework (objective P03). That infrastructure will certainly include more strategic use of aggregated data from our exit surveys and new-hire surveys (introduced in 2007/08) as well as greater involvement of Cool Aid's Staff Development Committee in strategic matters related to People Development.



Quarterly online *mini*-surveys is one example of new initiatives being considered.