



Three-Year Accreditation

CARF
Survey Report
for
EXCEED, A Division of
Valley Resource
Center

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Three-Year Accreditation

Organization

EXCEED, A Division of Valley Resource Center (EXCEED)
1285 North Santa Fe
Hemet, CA 92543

Organizational Leadership

Andrea Wells, Assistant Director
Lee Trisler, Executive Director
Richard Giese, President

Survey Dates

November 13-14, 2014

Survey Team

Pat L. Steele, Administrative Surveyor
Henrietta G. Fishman, LCSW, DCSW, CASAC, Program Surveyor
Monica Elsbrock, Program Surveyor

Programs/Services Surveyed

Community Employment Services: Employment Supports
Community Employment Services: Job Development
Employee Development Services
Employment Planning Services
Organizational Employment Services

Previous Survey

October 12-14, 2011
Three-Year Accreditation

Survey Outcome

Three-Year Accreditation
Expiration: December 2017

SURVEY SUMMARY

EXCEED, A Division of Valley Resource Center (EXCEED) has strengths in many areas.

- The board of EXCEED demonstrates a good understanding of its governance and fiduciary responsibilities. The board members dedicate significant amounts of time to the organization. They are strongly supportive of, and dedicated to, improving the lives of clients.
- The executive director has served the organization extremely well over the past three decades, taking it from a fledgling organization to a large organization with multiple programs and services. She has the confidence of the board members and personnel alike and her community roots are deep.
- EXCEED's commitment to planning is evidenced by its investment of time and energy in gathering input from the stakeholders and examining trends, opportunities, and challenges related to service delivery. Its well-written strategic plan includes objectives with time frames and provides a road map tied to the organization's mission and values.
- The health and safety program is well organized due, in large part, to an active safety committee and the staff member in charge of the program. Health and safety self-inspections and tests of all the emergency plans are conducted regularly. The results are shared with staff members and any identified areas for improvement are promptly addressed. Clients receive intensive safety training and can readily describe the steps that they would take in the event of a natural disaster or other emergency.
- The human resources department's operations are based on a system of well-defined procedures and policies. Performance evaluations are completed in a timely fashion and address the staff member's duties as outlined in the job description.
- The performance measurement and management system is superb. The system provides information and metrics to be used as a basis for strategic planning, program expansion, and resource allocation.
- The longevity of so many of the staff members is impressive, especially in light of the financial challenges that EXCEED has faced over the past several years. Despite wage freezes and reductions in benefits, there has been limited personnel turnover. Given the challenges that it has faced, the organization's continued dedication to its clients, mission, and values is noteworthy.
- The recently adopted cultural competency and diversity plan is thorough and addresses how EXCEED will respond to the diversity of stakeholders. If the organization accomplishes the many objectives established in the plan, it is anticipated that the personnel could effectively work on a cross-cultural basis.
- The staff members are committed to developing meaningful and creative services that enhance clients' lives. Clients and their families expressed satisfaction with the quality of services and availability of staff members to assist them with issues and concerns.
- EXCEED provides a flexible continuum of vocational services to meet the needs of a diverse population. Clients and family members are provided extensive opportunities for input to staff members and leadership.

- The organization is active in local advocacy efforts. The assistant executive director served as a member and chair of the California Disability Services Association and now serves on EXCEED's board. Clients are active in support groups and People First activities, and are well versed on their rights.
- Employers are very pleased with the services that they receive from EXCEED. Their satisfaction is readily apparent from the numerous job placements that have been made in their businesses. It is noteworthy that the longevity of some of the clients exceeds seven years. Major employers, including Walgreens, Lowe's®, and Vons, provide a very welcoming environment to clients. Store personnel are supportive of clients and proud of their accomplishments.
- Clients' job retention rates are impressive. For example, 80 percent of clients placed in jobs reach their 90-day stability benchmark. The wages earned by clients receiving community employment services are, in many cases, well above the minimum wage.
- The funding sources stated that they are very pleased with EXCEED's services and are happy to make referrals to the organization. They commented that the organization's reporting and billing practices are always thorough and timely. According to one funding source, EXCEED creates "solid situational assessments." Employers throughout the region rely on the organization to conduct the situational assessments. Of the clients hired, 100 percent have reached their 90-day retention mark. Of particular note, this retention rate applies to all hires made subsequent to situational assessments over the past three years.
- EXCEED's modern and clean buildings are very welcoming and attractive. They are located in industrial parks in the communities where EXCEED provides services. Many of the organization's business neighbors have hired clients, which reflects the noteworthy success of the organization's personnel in connecting with neighboring businesses.
- The staff members are professional and caring. The longevity of so many of the staff members is a tribute to the team members' commitment. Clients are treated with respect and it is apparent that staff members are particularly proud of each client's accomplishments.
- The organization's holistic and thorough community assessment reports are acknowledged by the funders to be "stellar." The reports address all aspects of the client's functional capacity, work habits, personal preferences, and attributes indicating the likelihood of successful employment.
- Commitment to client safety is of utmost concern at EXCEED. The individual service plans take health and safety risks into consideration and include comprehensive action plans. For example, a client was moving too quickly at work and making mistakes due to drinking too many energy drinks. The employer and case manager developed a plan with wide array of natural supports, including retail clerks to help him curb this habit.

EXCEED received no recommendations from this accreditation survey. Consultation given does not indicate nonconformance to standards but is offered as a suggestion for further quality improvement.

On balance, EXCEED demonstrates full conformance to the CARF standards at this time. The positive attitude with which the management and staff members prepared for and participated in this survey and their receptivity to the consultation and other feedback provided during the survey instill confidence that the organization, at all levels, is committed to ongoing performance improvement and service quality. EXCEED has strong policies and practices in place due, in large

part, to the organization's practice of ensuring that the personnel most impacted by each policy are involved and consulted when new policies or modifications to policies are under consideration. EXCEED is exceptionally adept at gathering input from stakeholders and uses this information in the strategic planning process. The organization's fiscal situation is a primary concern. The challenging service funding environment in which EXCEED operates has impacted its ability to execute the long-term strategic plan, to maintain the quality of its day-to-day operations, and damaged the organization's overall fiscal health. Although the organization appears to manage its fiscal affairs responsibly, it has had to enact a number of budget-cutting strategies. EXCEED is encouraged to engage in a development assessment that evaluates its essential fundraising elements, identifies strengths and opportunities, and recommends a course of action for future success.

EXCEED, A Division of Valley Resource Center has earned a Three-Year Accreditation. The organization is commended for its services, strong leadership, and committed staff members, and recognized for its efforts in pursuit of international accreditation. The organization is encouraged to continue to utilize the CARF standards on an ongoing basis as a framework for continuous quality improvement to ensure that the opportunities provided to clients are valued and of high quality.

SECTION 1. ASPIRE TO EXCELLENCE®

A. Leadership

Principle Statement

CARF-accredited organizations identify leadership that embraces the values of accountability and responsibility to the individual organization's stated mission. The leadership demonstrates corporate social responsibility.

Key Areas Addressed

- Leadership structure
- Leadership guidance
- Commitment to diversity
- Corporate responsibility
- Corporate compliance

Recommendations

There are no recommendations in this area.

Consultation

- EXCEED has developed a mechanism to follow up and address allegations of violations of the ethical codes. To ensure that staff members are knowledgeable about this procedure, it is suggested that this information be included in the employee handbook.
-

C. Strategic Planning

Principle Statement

CARF-accredited organizations establish a foundation for success through strategic planning focused on taking advantage of strengths and opportunities and addressing weaknesses and threats.

Key Areas Addressed

- Strategic planning considers stakeholder expectations and environmental impacts
 - Written strategic plan sets goals
 - Plan is implemented, shared, and kept relevant
-

Recommendations

There are no recommendations in this area.

Consultation

- The organization establishes goals and objectives each year. However, it sometimes lacks the resources to accomplish them. It is encouraged to look to external resources as a means of accomplishing some of the objectives. For example, students in a community college class might assist in developing a marketing plan. United Way[®] could help develop a fundraising plan and might provide training on grant writing. The large number of retirees in Hemet could be tapped to volunteer for fundraising events and social activities for clients.
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D. Input from Persons Served and Other Stakeholders

Principle Statement

CARF-accredited organizations continually focus on the expectations of the persons served and other stakeholders. The standards in this subsection direct the organization's focus to soliciting, collecting, analyzing, and using input from all stakeholders to create services that meet or exceed the expectations of the persons served, the community, and other stakeholders.

Key Areas Addressed

- Ongoing collection of information from a variety of sources
 - Analysis and integration into business practices
 - Leadership response to information collected
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Recommendations

There are no recommendations in this area.

E. Legal Requirements

Principle Statement

CARF-accredited organizations comply with all legal and regulatory requirements.

Key Areas Addressed

- Compliance with all legal/regulatory requirements
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Recommendations

There are no recommendations in this area.

Consultation

- EXCEED has developed written procedures to guide personnel in responding to legal actions such as subpoenas and search warrants. It is suggested that these procedures be included in the employee handbook.
-

F. Financial Planning and Management

Principle Statement

CARF-accredited organizations strive to be financially responsible and solvent, conducting fiscal management in a manner that supports their mission, values, and annual performance objectives. Fiscal practices adhere to established accounting principles and business practices. Fiscal management covers daily operational cost management and incorporates plans for long-term solvency.

Key Areas Addressed

- Budget(s) prepared, shared, and reflective of strategic planning
 - Financial results reported/compared to budgeted performance
 - Organization review
 - Fiscal policies and procedures
 - Review of service billing records and fee structure
 - Financial review/audit
 - Safeguarding funds of persons served
-

Recommendations

There are no recommendations in this area.

Consultation

- Although EXCEED appears to manage its fiscal affairs in a responsible manner, the organization has faced and continues to confront very challenging funding and business environments. Years of underfunded services and a decreasing contract procurement market have taken its toll on the organization's financial health and ability to accomplish long-term expansion and growth. It appears unlikely the funding situation will significantly improve in the near future. Therefore, it is suggested that EXCEED develop and implement a development program. The organization is encouraged to consider a variety of options, including estate planning, major gifts and bequests, corporate philanthropy, foundations, a capital campaign, special events, grants, and relationships with grantors. It could reach out to colleges, United Way, and other entities for assistance in this regard.
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G. Risk Management

Principle Statement

CARF-accredited organizations engage in a coordinated set of activities designed to control threats to their people, property, income, goodwill, and ability to accomplish goals.

Key Areas Addressed

- Identification of loss exposures
- Development of risk management plan
- Adequate insurance coverage

Recommendations

There are no recommendations in this area.

Consultation

- EXCEED has developed or implemented written procedures regarding communications that address media relations and social media. It is suggested that the procedures be included in the employee handbook.
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H. Health and Safety

Principle Statement

CARF-accredited organizations maintain healthy, safe, and clean environments that support quality services and minimize risk of harm to persons served, personnel, and other stakeholders.

Key Areas Addressed

- Inspections
 - Emergency procedures
 - Access to emergency first aid
 - Competency of personnel in safety procedures
 - Reporting/reviewing critical incidents
 - Infection control
-

Recommendations

There are no recommendations in this area.

Consultation

- The organization continues to be well served by the director of the health and safety program. It is suggested that another staff member be prepared or groomed for this role to ensure that EXCEED continues to provide safe and clean service environments in the event of personnel turnover.
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I. Human Resources

Principle Statement

CARF-accredited organizations demonstrate that they value their human resources. It should be evident that personnel are involved and engaged in the success of the organization and the persons they serve.

Key Areas Addressed

- Adequate staffing
 - Verification of background/credentials
 - Recruitment/retention efforts
 - Personnel skills/characteristics
 - Annual review of job descriptions/performance
 - Policies regarding students/volunteers, if applicable
-

Recommendations

There are no recommendations in this area.

Consultation

- EXCEED is encouraged to actively recruit volunteers who could assist in expanding opportunities for social and other activities for clients. The Inland Empire area is home to many clients with varying degrees of talent who might assist the organization in many ways. These potential volunteers could become strong supporters of EXCEED and might help promote the participation of clients in community life.
 - It is suggested that the employee handbook outline the process an employee with a disability should use to request an accommodation, the decision-making chain, and the associated time frame.
-

J. Technology

Principle Statement

CARF-accredited organizations plan for the use of technology to support and advance effective and efficient service and business practices.

Key Areas Addressed

- Written technology and system plan

Recommendations

There are no recommendations in this area.

Consultation

- The organization is encouraged to expand its utilization of social media to build public support for its mission. Facebook, Twitter, blogs, and message boards might be effective ways to communicate with members of the public who might not regularly access traditional media sources.
-

K. Rights of Persons Served

Principle Statement

CARF-accredited organizations protect and promote the rights of all persons served. This commitment guides the delivery of services and ongoing interactions with the persons served.

Key Areas Addressed

- Communication of rights
 - Policies that promote rights
 - Complaint, grievance, and appeals policy
 - Annual review of complaints
-

Recommendations

There are no recommendations in this area.

L. Accessibility

Principle Statement

CARF-accredited organizations promote accessibility and the removal of barriers for the persons served and other stakeholders.

Key Areas Addressed

- Written accessibility plan(s)
- Requests for reasonable accommodations

Recommendations

There are no recommendations in this area.

M. Performance Measurement and Management

Principle Statement

CARF-accredited organizations are committed to continually improving their organizations and service delivery to the persons served. Data are collected and analyzed, and information is used to manage and improve service delivery.

Key Areas Addressed

- Information collection, use, and management
 - Setting and measuring performance indicators
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Recommendations

There are no recommendations in this area.

N. Performance Improvement

Principle Statement

The dynamic nature of continuous improvement in a CARF-accredited organization sets it apart from other organizations providing similar services. CARF-accredited organizations share and provide the persons served and other interested stakeholders with ongoing information about their actual performance as a business entity and their ability to achieve optimal outcomes for the persons served through their programs and services.

Key Areas Addressed

- Proactive performance improvement
 - Performance information shared with all stakeholders
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Recommendations

There are no recommendations in this area.

SECTION 2. QUALITY INDIVIDUALIZED SERVICES AND SUPPORTS

A. Program/Service Structure

Principle Statement

A fundamental responsibility of the organization is to provide a comprehensive program structure. The staffing is designed to maximize opportunities for the persons served to obtain and participate in the services provided.

Key Areas Addressed

- Services are person centered and individualized
 - Persons are given information about the organization's purposes and ability to address desired outcomes
 - Documented scope of services shared with stakeholders
 - Service delivery based on accepted field practices
 - Communication for effective service delivery
 - Entrance/exit/transition criteria
-

Recommendations

There are no recommendations in this area.

B. Individual-Centered Service Planning, Design, and Delivery

Principle Statement

Improvement of the quality of an individual's services/supports requires a focus on the person and/or family served and their identified strengths, abilities, needs, and preferences. The organization's services are designed around the identified needs and desires of the persons served, are responsive to their expectations and desired outcomes from services, and are relevant to their maximum participation in the environments of their choice.

The person served participates in decision making, directing, and planning that affects his or her life. Efforts to include the person served in the direction or delivery of those services/supports are evident.

Key Areas Addressed

- Services are person-centered and individualized
 - Persons are given information about the organization's purposes and ability to address desired outcomes
-

Recommendations

There are no recommendations in this area.

D. Employment Services Principle Standards

Principle Statement

An organization seeking CARF accreditation in the area of employment services provides individualized services and supports to achieve identified employment outcomes. The array of services and supports may include:

- Identification of employment opportunities and resources in the local job market.
- Development of viable work skills that match workforce needs within the geographic area.
- Development of realistic employment goals.
- Establishment of service plans to achieve employment outcomes.
- Identification of resources and supports to achieve and maintain employment.
- Coordination of and referral to employment-related services and supports.

The organization maintains its strategic positioning in the employment sector of the community by designing and continually improving its services based on input from the persons served and from employers in the local job market, and managing results of the organization's outcomes management system. The provision of quality employment services requires a continuous focus on the persons served and the personnel needs of employers in the organization's local job market.

Key Areas Addressed

- Goals of the persons served
- Personnel needs of local employers
- Community resources available
- Economic trends in the local employment sector

Recommendations

There are no recommendations in this area.

SECTION 3. EMPLOYMENT AND COMMUNITY SERVICES

Principle Statement

An organization seeking CARF accreditation in the area of employment and community services assists the persons served through an individualized person-centered process to obtain access to the services, supports, and resources of their choice to achieve their desired outcomes. This may be accomplished by direct service provision, linkages to existing generic opportunities and natural supports in the community, or any combination of these. The persons served are included in their communities to the degree they desire.

The organization provides the persons served with information so that they may make informed choices and decisions. Although we use the phrase *person served*, this may also include *family served*, as appropriate to the service and the individual.

The services and supports are arranged and changed as necessary to meet the identified desires of the persons served. Service designs address identified individual, family, socioeconomic, and cultural preferences.

Depending on the program's scope of services, expected results from these services/supports may include:

- Increased inclusion in community activities.
- Increased or maintained ability to perform activities of daily living.
- Increased self-direction, self-determination, and self-reliance.
- Self-esteem.
- Housing opportunities.
- Increased independence.
- Meaningful activities.
- Increased employment options.
- Employment obtained and maintained.
- Competitive employment.

- Economic self-sufficiency.
- Employment with benefits.
- Career advancement.

A. Employment Planning Services

Principle Statement

Employment planning services are designed to assist a person seeking employment to learn about employment opportunities within the community and to make informed decisions. Employment planning services are individualized to assist a person to choose employment outcomes and/or career development opportunities based on his or her preferences, strengths, abilities, and needs. Services begin from a presumption of employability for all persons and seek to provide meaningful information related to planning effective programs for persons with intervention strategies needed to achieve the goal of employment.

Employment planning uses some type of employment exploration model. This may involve one or more of the following:

- Situational assessments.
- Paid work trials.
- Job tryouts (may be individual, crew, enclave, cluster, etc.).
- Job shadowing.
- Community-based assessments.
- Simulated job sites.
- Staffing agencies/temporary employment agencies.
- Volunteer opportunities.
- Transitional employment.

Key Areas Addressed

- Employment opportunities within the community
- Informed decision-making by participants
- Referrals to services to implement employment plan

Recommendations

There are no recommendations in this area.

C. Community Employment Services

Principle Statement

Community employment services assist persons to obtain successful community employment opportunities that are responsive to their choices and preferences. Through a strengths-based approach the program provides person-directed services/supports to individuals to choose, achieve, and maintain employment in integrated community employment settings.

Work is a fundamental part of adult life. Individually tailored job development, training, and support recognize each person's employability and potential contribution to the labor market. Persons are supported as needed through an individualized person-centered model of services to choose and obtain a successful employment opportunity consistent with their preferences, keep the employment, and find new employment if necessary or for purposes of career advancement.

Such services may be described as individual placements, contracted temporary personnel services, competitive employment, supported employment, transitional employment, mobile work crews, contracted work groups, enclaves, community-based SourceAmerica® contracts, and other business-based work groups in community-integrated designs. In Canada employment in the form of bona fide volunteer placements is possible.

Individuals may be paid by community employers or by the organization. Employment is in the community.

Job Development

Successful job development concurrently uses assessment information about the strengths and interests of the person seeking employment to target the types of jobs available from potential employers in the local labor market. Typical job development activities include reviewing local employment opportunities and developing potential employers/customers through direct and indirect promotional strategies. Job development may include facilitating a hiring agreement between an employer and a person seeking employment. Some persons seeking employment may want assistance at only a basic, informational level such as self-directed job search.

Employment Supports

Employment support services are activities that are employment-related to promote successful training of a person to a new job, job adjustment, retention, and advancement. These services are based on the individual employee with a focus on achieving long-term retention of the person in the job.

The level of employment support services is individualized to each employee and the complexity of the job.

Often supports are intensive for the initial orientation and training of an employee with the intent of leading to natural supports and/or reduced external job coaching. However, some persons may not require any employment supports at the job site; others may require intensive initial training with a quick decrease in supports, while some will be most successful when long-term supports are provided.

Supports can include assisting the employee with understanding the job culture, industry practices, and work behaviors expected by the employer. It may also include helping the employer and coworkers to understand the support strategies and accommodations needed by the worker.

Supports are a critical element of the long-term effectiveness of community employment. Support services address issues such as assistance in training a person to complete new tasks, changes in work schedule or work promotion, a decrease in productivity of the person served, adjusting to new supervisors, and managing changes in nonwork environments or other critical life activities that may affect work performance. Routine follow-up with the employer and the employee is crucial to continued job success.

Key Areas Addressed

- Integrated employment choice
 - Integrated employment obtainment
 - Employment provided in regular business settings
 - Integrated employment retention
 - Provides career advancement resources
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Recommendations

There are no recommendations in this area.

Consultation

- It is suggested that EXCEED explore the use of interactive materials to stimulate, engage, and enhance clients' work-related skills.
 - The organization is encouraged to expand its resources, including computers, to enhance the preparation of clients for the workforce.
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E. Employee Development Services

Principle Statement

Employee development services are individualized services/supports that assist persons seeking employment to develop or reestablish skills, attitudes, personal characteristics, interpersonal skills, work behaviors, functional capacities, etc., to achieve positive employment outcomes.

Such services/supports are time limited and can be provided directly to persons seeking employment or indirectly through corporate employer/employee support programs. These services/supports can be provided at job sites, within formal and organized training and educational settings, through coaching, by tutorial services, or within the organization. These services may be offered in a free-standing unit or as a functional piece of other services.

Key Areas Addressed

- Skills development/reestablishment
 - Attitude development/reestablishment
 - Work behaviors development/reestablishment
 - Employment outcomes
-

Recommendations

There are no recommendations in this area.

G. Organizational Employment Services

Principle Statement

Organizational employment services are designed to provide paid work to the persons served in locations owned, leased, rented, or managed by the service provider. A critical component and value of organizational employment services is to use the capacity of the organization's employment and training service design to create opportunities for persons to achieve desired employment outcomes in their community of choice.

Service models are flexible and may include a variety of enterprises and business designs, including organization-owned businesses such as retail stores, restaurants, shops, franchises, etc.

Key Areas Addressed

- Paid work provided by organization
 - Employment goals of persons served
 - Legal guidelines adherence
 - Increased wages and skills
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Recommendations

There are no recommendations in this area.

Consultation

- The organizational employment program experiences downtime due to its low volume of contract work. EXCEED is encouraged to examine ways to better utilize downtime. These might include community outings, arts and crafts, bringing in guest speakers, or other recreational activities that could increase clients' community integration. An active group of volunteers might be able to help EXCEED facilitate these options.
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PROGRAMS/SERVICES BY LOCATION

EXCEED, A Division of Valley Resource Center

1285 North Santa Fe
Hemet, CA 92543

Community Employment Services: Employment Supports
Organizational Employment Services

Perris Programs

2050 Trumble Road
Perris, CA 92570

Community Employment Services: Employment Supports
Organizational Employment Services

Mission Grove

7893 Mission Grove Parkway South, Suite C
Riverside, CA 92508

Community Employment Services: Employment Supports
Community Employment Services: Job Development
Employee Development Services
Employment Planning Services