

**CARF Accreditation Report**  
**for**  
**Valley Resource Center Inc. DBA**  
**EXCEED**

**Three-Year Accreditation**



# Contents

[Executive Summary](#)

[Survey Details](#)

[Survey Participants](#)

[Survey Activities](#)

[Program\(s\)/Service\(s\) Surveyed](#)

[Representations and Constraints](#)

[Survey Findings](#)

[Program\(s\)/Service\(s\) by Location](#)

## About CARF

CARF is an independent, nonprofit accreditor of health and human services, enhancing the lives of persons served worldwide.

The accreditation process applies CARF's internationally recognized standards during a site survey conducted by peer surveyors. Accreditation, however, is an ongoing process that distinguishes a provider's service delivery and signals to the public that the provider is committed to continuous performance improvement, responsive to feedback, and accountable to the community and its other stakeholders.

CARF accreditation promotes providers' demonstration of value and Quality Across the Lifespan® of millions of persons served through application of rigorous organizational and program standards organized around the ASPIRE to Excellence® continuous quality improvement framework. CARF accreditation has been the recognized benchmark of quality health and human services for more than 50 years.

For more information or to contact CARF, please visit [www.carf.org/contact-us](http://www.carf.org/contact-us).

**Organization**

Valley Resource Center Inc. DBA EXCEED  
3550 East Florida Avenue, Suite D  
Hemet, CA 92544

**Organizational Leadership**

Lee Trisler, Chief Executive Officer  
Richard Giese, President

**Survey Number**

188270

**Survey Date(s)**

January 27, 2025–January 28, 2025

**Surveyor(s)**

Cary D. Kelsey, MS, Administrative  
Jackie Sundquist, Program

**Program(s)/Service(s) Surveyed**

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

**Previous Survey**

November 8, 2021–November 9, 2021  
Three-Year Accreditation

**Accreditation Decision****Three-Year Accreditation**

**Expiration: December 31, 2027**

# Executive Summary

This report contains the findings of CARF's site survey of Valley Resource Center Inc. DBA EXCEED conducted January 27, 2025–January 28, 2025. This report includes the following information:

- Documentation of the accreditation decision and the basis for the decision as determined by CARF's consideration of the survey findings.
- Identification of the specific program(s)/service(s) and location(s) to which this accreditation decision applies.
- Identification of the CARF surveyor(s) who conducted the survey and an overview of the CARF survey process and how conformance to the standards was determined.
- Feedback on the organization's strengths and recognition of any areas where the organization demonstrated exemplary conformance to the standards.
- Documentation of the specific sections of the CARF standards that were applied on the survey.
- Recommendations for improvement in any areas where the organization did not meet the minimum requirements to demonstrate full conformance to the standards.
- Any consultative suggestions documented by the surveyor(s) to help the organization improve its program(s)/service(s) and business operations.

## Accreditation Decision

On balance, Valley Resource Center Inc. DBA EXCEED demonstrated substantial conformance to the standards. EXCEED's personnel were well prepared for this survey and knowledgeable about the CARF standards. EXCEED is committed to the provision of quality services that are meaningful and valued by its stakeholders. The organization is led by a competent CEO, leadership team, and board of directors who successfully navigated the COVID-19 pandemic and continue to manage the uncertainties of funding streams while meeting the needs of clients with quality services. EXCEED's infrastructure of plans, policies, and written procedures are holistic in nature and well integrated. The organization's planning in areas such as cultural competency, accessibility, and risk management informs its performance measurement and management plan, which in turn informs its strategic plan. All these plans support a strong business and service delivery operation. Clients and employers indicated a high degree of satisfaction with the services provided. Employers are highly pleased with EXCEED's ability to match clients to the jobs they need filled. The funding source confidently makes referrals to the organization based on its successful outcomes. Areas for improvement include strategic planning, risk management, health and safety, workforce development and management, and technology, though addressing some of these recommendations is simply a matter of representing practices in written procedures. EXCEED is a well-run organization providing quality services to its clients and appears likely to maintain its position as an important resource to the communities it serves.

Valley Resource Center Inc. DBA EXCEED appears likely to maintain and/or improve its current method of operation and demonstrates a commitment to ongoing quality improvement. Valley Resource Center Inc. DBA EXCEED is required to submit a post-survey Quality Improvement Plan (QIP) to CARF that addresses all recommendations identified in this report.

**Valley Resource Center Inc. DBA EXCEED has earned a Three-Year Accreditation.** The leadership team and staff are complimented and congratulated for this achievement. In order to maintain this accreditation, throughout the term of accreditation, the organization is required to:

- Submit annual reporting documents and other required information to CARF, as detailed in the Accreditation Policies and Procedures section in the standards manual.
- Maintain ongoing conformance to CARF's standards, satisfy all accreditation conditions, and comply with all accreditation policies and procedures, as they are published and made effective by CARF.

## Survey Details

### Survey Participants

The survey of Valley Resource Center Inc. DBA EXCEED was conducted by the following CARF surveyor(s):

- Cary D. Kelsey, MS, Administrative
- Jackie Sundquist, Program

CARF considers the involvement of persons served to be vital to the survey process. As part of the accreditation survey for all organizations, CARF surveyors interact with and conduct direct, confidential interviews with consenting current and former persons served in the program(s)/service(s) for which the organization is seeking accreditation. In addition, as applicable and available, interviews may be conducted with family members and/or representatives of the persons served such as guardians, advocates, or members of their support system.

Interviews are also conducted with individuals associated with the organization, as applicable, which may include:

- The organization's leadership, such as board members, executives, owners, and managers.
- Business unit resources, such as finance and human resources.
- Personnel who serve and directly interact with persons served in the program(s)/service(s) for which the organization is seeking accreditation.
- Other stakeholders, such as referral sources, payers, insurers, and fiscal intermediaries.
- Community constituents and governmental representatives.

### Survey Activities

Achieving CARF accreditation involves demonstrating conformance to the applicable CARF standards, evidenced through observable practices, verifiable results over time, and comprehensive supporting documentation. The survey of Valley Resource Center Inc. DBA EXCEED and its program(s)/service(s) consisted of the following activities:

- Confidential interviews and direct interactions, as outlined in the previous section.
- Direct observation of the organization's operations and service delivery practices.
- Observation of the organization's location(s) where services are delivered.
- Review of organizational documents, which may include policies; plans; written procedures; promotional materials; governing documents, such as articles of incorporation and bylaws; financial statements; and other documents necessary to determine conformance to standards.

- Review of documents related to program/service design, delivery, outcomes, and improvement, such as program descriptions, records of services provided, documentation of reviews of program resources and services conducted, and program evaluations.
- Review of records of current and former persons served.

## **Program(s)/Service(s) Surveyed**

The survey addressed by this report is specific to the following program(s)/service(s):

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

A list of the organization's accredited program(s)/service(s) by location is included at the end of this report.

## **Representations and Constraints**

The accreditation decision and survey findings contained in this report are based on an on-balance consideration of the information obtained by the surveyor(s) during the site survey. Any information that was unavailable, not presented, or outside the scope of the survey was not considered and, had it been considered, may have affected the contents of this report. If at any time CARF subsequently learns or has reason to believe that the organization did not participate in the accreditation process in good faith or that any information presented was not accurate, truthful, or complete, CARF may modify the accreditation decision, up to and including revocation of accreditation.

## **Survey Findings**

This report provides a summary of the organization's strengths and identifies the sections of the CARF standards that were applied on the survey and the findings in each area. In conjunction with its evaluation of conformance to the specific program/service standards, CARF assessed conformance to its business practice standards, referred to as Section 1. ASPIRE to Excellence, which are designed to support the delivery of the program(s)/service(s) within a sound business operating framework to promote long-term success.

The specific standards applied from each section vary based on a variety of factors, including, but not limited to, the scope(s) of the program(s)/service(s), population(s) served, location(s), methods of service delivery, and survey type. Information about the specific standards applied on each survey is included in the standards manual and other instructions that may be provided by CARF.

## **Areas of Strength**

CARF found that Valley Resource Center Inc. DBA EXCEED demonstrated the following strengths:

- EXCEED is led by a capable CEO who has served the organization for over 40 years. She has created a leadership team that shares her commitment to the mission of the organization and dedication to providing quality services to clients.

- Members of EXCEED's board of directors represent a wide range of community stakeholders. Board members expressed a high degree of satisfaction with and trust in the CEO and her leadership team, noting how well they navigated the COVID-19 pandemic. One board member noted that the organization does a commendable job despite being thin on staff members. A board member familiar with the organization's community employment clients praised the quality of their work.
- EXCEED has engaged its insurance carrier representative to provide other support and consultative services, which help the organization to be proactive in identifying and mitigating risk exposures. In the area of workforce development, the consultant provides a series of question/answer opportunities for personnel. The consultant also assists leadership with the claims process as needed.
- EXCEED is an active member of the California Disabilities Services Association (CDSA). Leadership is commended for its participation in CDSA, which advocates for and gives voice to the needs of EXCEED's clients in the public policy arena.
- The CEO and her leadership team are commended for their holistic and integrated approach to business functions and service delivery operations. For instance, the performance measurement and improvement plan is well thought out, detailing objectives and indicators for critical business functions and service delivery. These plans/charts are color coded, making them easier to understand. In addition, the organization's other plans are interrelated, leading to the development of meaningful performance measurement indicators that inform the organization's strategic plan. They are regularly reviewed for relevance and the continuous development and evolution of effective services and general operations.
- EXCEED is recognized for its impactful bimonthly peer support group composed of employment service clients. This client-led group functions as a client council and provides a vital social outlet. Participants are empowered to manage funds raised annually, allocating them for initiatives such as holiday parties. Many of EXCEED's clients work long, demanding hours and have limited opportunities for social interaction outside of work. This group creates a supportive space for them to share challenges and successes, celebrate milestones like birthdays, and offer meaningful input to the organization's board, enhancing their engagement and sense of belonging.
- EXCEED's administration and staff are dedicated to ensuring that clients have all the resources necessary for their success. Clients and employers consistently reported that EXCEED's staff is quick to resolve problems and remove barriers to success.
- Employers who partner with EXCEED consistently find that clients matched with their job openings are excellent fits for the roles, work environments, and workplace cultures. This success is reflected in the longevity of these placements, with many clients remaining with the same employer for over a decade and continuing to thrive.
- EXCEED has established a strong reputation with its state funder, which consistently refers clients with confidence, knowing that EXCEED prioritizes the needs of clients above all else. Stakeholders reported a high level of satisfaction with the organization's services and outcomes.
- EXCEED's staff is deeply committed to clients' growth and empowerment, focusing on their long-term success and personal development, not just job placement.

## Opportunities for Quality Improvement

The CARF survey process identifies opportunities for continuous improvement, a core concept of "aspiring to excellence." This section of the report lists the sections of the CARF standards that were applied on the survey, including a description of the business practice area and/or the specific program(s)/service(s) surveyed and a summary of the key areas addressed in that section of the standards.

In this section of the report, a recommendation identifies any standard for which CARF determined that the organization did not meet the minimum requirements to demonstrate full conformance. All recommendations must be addressed in a QIP submitted to CARF.

In addition, consultation may be provided for areas of or specific standards where the surveyor(s) documented suggestions that the organization may consider to improve its business or service delivery practices. Note that consultation may be offered for areas of specific standards that do not have any recommendations. Such consultation does not indicate nonconformance to the standards; it is intended to offer ideas that the organization might find helpful in its ongoing quality improvement efforts. The organization is not required to address consultation.

When CARF surveyors visit an organization, their role is that of independent peer reviewers, and their goal is not only to gather and assess information to determine conformance to the standards, but also to engage in relevant and meaningful consultative dialogue. Not all consultation or suggestions discussed during the survey are noted in this report. The organization is encouraged to review any notes made during the survey and consider the consultation or suggestions that were discussed.

During the process of preparing for a CARF accreditation survey, an organization may conduct a detailed self-assessment and engage in deliberations and discussions within the organization as well as with external stakeholders as it considers ways to implement and use the standards to guide its quality improvement efforts. The organization is encouraged to review these discussions and deliberations as it considers ways to implement innovative changes and further advance its business and service delivery practices.

## **Section 1. ASPIRE to Excellence®**

### **1.A. Leadership**

#### **Description**

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 and responsibilities
- Person-centered philosophy
- Organizational guidance
- Leadership accessibility
- Cultural competency, diversity, and inclusion
- Corporate responsibility
- Organizational fundraising, if applicable

#### **Recommendations**

There are no recommendations in this area.

#### **Consultation**

- EXCEED collects demographic data on its community and clients. Leadership might consider including a page of this information in its cultural competency, diversity, and inclusion plan to support the inclusion of plan goals or the creation of new ones.
- Some of the organization's ethical codes of conduct are located in separate documents. For clarity and ease of access, it is suggested that leadership create a single document containing all ethical codes of conduct.



- The organization uses the same investigation procedures to deal with allegations of violations of ethical codes of conduct that it uses for its corporate compliance allegations. It is suggested that the organization's ethical codes of conduct include a reference regarding where to find this information.
- The designation of the organization's corporate compliance officer (CCO) is documented in an administrative policy. The CEO might consider writing a designation memo or letter to this individual and placing a copy in the individual's personnel file. The job description for this designated individual does not include corporate compliance officer duties. Leadership might consider including CCO duties in this individual's job description.

## 1.C. Strategic Planning

### Description

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

- Environmental considerations
- Strategic plan development, implementation, and periodic review

### Recommendations

#### 1.C.2.b.(1)

#### 1.C.2.b.(2)

#### 1.C.2.b.(3)(a)

#### 1.C.2.b.(3)(b)

EXCEED has a number of processes, including staff and board retreats, budget development meetings, risk management, and performance measurement processes, that contribute to the development of the strategic plan. Although the strategic plan sets goals and priorities, it does not reflect the organization's financial position at the time the plan is written or in the future. The organization should implement a strategic plan that reflects the organization's financial position at the time the plan is written, at projected point(s) in the future, and with respect to allocating resources necessary to support accomplishment of the plan in the financial and workforce areas. This could be accomplished by adding a paragraph to the plan summarizing the organization's current financial position and estimating the amount of staff time and funds needed to accomplish plan goals and where these resources are coming from (e.g., approved budget, reserves, grant monies).

## 1.D. Input from Persons Served and Other Stakeholders

### Description

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

- Collection of input from persons served, personnel, and other stakeholders
- Integration of input into business practices and planning

### Recommendations

There are no recommendations in this area.

## Consultation

- Leadership may find it helpful to supplement its traditional satisfaction surveys with a few appreciative inquiry surveys. This approach looks at what is best in the experiences of clients and other stakeholders and may include questions like, "Can you tell me about a time when our organization exceeded your expectations?" When concerns are raised, the interviewee could be asked to state his/her concern in the form of a wish. It is suggested that the interviewee be asked open questions, allowing the organization to better understand their experience.

## 1.E. Legal Requirements

### Description

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

### Key Areas Addressed

- Compliance with obligations
- Response to legal action
- Confidentiality and security of records

### Recommendations

There are no recommendations in this area.

## 1.F. Financial Planning and Management

### Description

CARF-accredited organizations strive to be financially responsible and solvent, conducting fiscal management in a manner that supports their mission, values, and 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

- Budgets
- Review of financial results and relevant factors
- Fiscal policies and procedures
- Reviews of bills for services and fee structures, if applicable
- Review/audit of financial statements
- Safeguarding funds of persons served, if applicable

### Recommendations

There are no recommendations in this area.

## 1.G. Risk Management

### Description

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

- Risk management plan implementation and periodic review
- Adequate insurance coverage
- Media relations and social media procedures
- Reviews of contract services

## Recommendations

### 1.G.1.a.(2)

EXCEED has a risk management plan that includes a column of information for each risk exposure titled "analysis," but the analysis does not address the potential frequency and severity of the risk. It is recommended that the organization implement a risk management plan that includes a comprehensive analysis of loss exposures. This could be accomplished by adding a chart to the risk management plan with a scale for the likelihood of occurrence (e.g., high, medium, or low) and a scale for severity of occurrence (e.g., severe, moderate, or mild).

## 1.H. Health and Safety

### Description

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

- Healthy and safe environment
- Competency-based training on health and safety procedures and practices
- Emergency and evacuation procedures
- Access to first aid and emergency information
- Critical incidents
- Infections and communicable diseases
- Health and safety inspections

### Recommendations

#### 1.H.10.a.(2)

#### 1.H.10.a.(3)

#### 1.H.10.a.(9)

#### 1.H.10.a.(10)

EXCEED has implemented written procedures for critical incidents that address most elements of the standard. The organization has also implemented a policy for each program that prohibits the use of seclusion and restraint. The intent of the CARF standards on critical incidents is that these apply to incidents that may involve clients, personnel, volunteers, and other stakeholders and that could occur in any organization even if some of them are prohibited practices and/or illegal. The organization should implement written procedures regarding critical incidents that specify the critical incidents of use of seclusion, use of restraint, wandering, and elopement.

### Consultation

- At both facilities, evacuation route maps are posted high on the wall. It is suggested that the organization consider lowering these maps so that all possible stakeholders can see them clearly. The organization might also consider how individuals with disabilities, such as those with vision loss, could understand this information.

- The organization's form used to document unannounced tests of its emergency procedures includes a space where the type of drill is noted. Leadership might consider listing all types of emergency drills at the top of the form, with a checkbox indicating which type of drill is being documented.
- First aid kits at the Mission Grove location did contain some supplies, but items such as disinfectants or antibiotic ointment were missing, and bandages appeared to be old. It is suggested that the organization review and update its first aid supplies.
- The written procedures regarding critical incidents include critical incidents involving medical emergencies, which may include medication errors or complications. The organization has implemented a policy that identifies that it has no role related to medications used by the clients in the programs seeking accreditation. Although the organization does not provide medication monitoring or medication management, it is encouraged to more clearly address critical incidents involving medication errors, as broadly defined by CARF, to include instances where a client, staff member, volunteer, visitor, or other stakeholder may report or may be observed to be having some difficulty that could be related to a medication, such as physical, cognitive, and/or behavioral changes due to medication levels, combinations of medications, side effects, etc.
- The organization's written analysis of critical incidents identifies causes and includes information about trends, areas needing improvement, actions taken to address the improvement needed, and whether the actions taken accomplished the intended results under the headings of "analysis," "suggestions," and "follow-up." For clarity, leadership might create new headings to correspond to elements of this CARF standard.

## 1.I. Workforce Development and Management

### Description

CARF-accredited organizations demonstrate that they value their human resources and focus on aligning and linking human resources processes, procedures, and initiatives with the strategic objectives of the organization. Organizational effectiveness depends on the organization's ability to develop and manage the knowledge, skills, abilities, and behavioral expectations of its workforce. The organization describes its workforce, which is often composed of a diverse blend of human resources. Effective workforce development and management promote engagement and organizational sustainability and foster an environment that promotes the provision of services that center on enhancing the lives of persons served.

### Key Areas Addressed

- Composition of workforce
- Ongoing workforce planning
- Verification of backgrounds/credentials/fitness for duty
- Workforce engagement and development
- Performance appraisals
- Succession planning

### Recommendations

#### 1.I.9.f.

#### 1.I.9.h.

EXCEED's written procedures for performance appraisal address most elements of the standard while other elements of the standard are addressed only in practice. The organization should expand its written procedures for performance appraisal to address measurable goals and opportunities for development.

## Consultation

- The organization has a list of topics covered with new staff members during the orientation and in its onboarding process. Some of the topics, such as mission and person-centered philosophy, are included on this list. Other topics, such as risk management and performance measurement, are embedded in other topics discussed during orientation. Leadership may find it helpful to list each topic in standard 1.I.6. on its training list to ensure that each item is at least briefly addressed or discussed during orientation.

## 1.J. Technology

### Description

Guided by leadership and a shared vision, CARF-accredited organizations are committed to exploring and, within their resources, acquiring and implementing technology systems and solutions that will support and enhance:

- Business processes and practices.
- Privacy and security of protected information.
- Service delivery.
- Performance management and improvement.
- Satisfaction of persons served, personnel, and other stakeholders.

### Key Areas Addressed

- Ongoing assessment of technology and data use, including input from stakeholders
- Technology and system plan implementation and periodic review
- Technology policies and procedures

### Recommendations

1.J.3.d.(2)

1.J.3.d.(4)

1.J.3.d.(7)

The organization should implement policies and procedures in the area of security, including audit capabilities; decommissioning of physical hardware and data destruction; and updates, configuration management, and change control. This could be accomplished by having EXCEED's information technology manager add these elements to its written technology procedures.

### Consultation

- The organization uses a narrative format for its technology and system plan. For clarity, leadership might consider using a chart format containing each element of the standard.

## 1.K. Rights of Persons Served

### Description

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

- Policies that promote rights of persons served
- Communication of rights to persons served
- Formal complaints by persons served

## Recommendations

There are no recommendations in this area.

## 1.L. Accessibility

### Description

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

### Key Areas Addressed

- Assessment of accessibility needs and identification of barriers
- Accessibility plan implementation and periodic review
- Requests for reasonable accommodations

### Recommendations

There are no recommendations in this area.

### Consultation

- Leadership may find it helpful to supplement the ways it identifies accessibility barriers by using a more formal tool designed to ask stakeholders specific questions about accessibility needs in architecture, environment, attitudes, finances, employment, communication, technology, transportation, and community integration.
- A number of goals in the organization's accessibility plan have timeframes that are noted as ongoing. This might suggest that goals are too large to be accomplished in a specific amount of time. Leadership is encouraged to review plan goals and the CARF definition of a plan, which can be found in the glossary of the standards manual. Writing smaller goals that are specific, measurable, achievable, relevant, and time bound (SMART) may be more effective.

## 1.M. Performance Measurement and Management

### Description

CARF-accredited organizations demonstrate a culture of accountability by developing and implementing performance measurement and management plans that produce information an organization can act on to improve results for the persons served, other stakeholders, and the organization itself.

The foundation for successful performance measurement and management includes:

- Leadership accountability and support.
- Mission-driven measurement.
- A focus on results achieved for the persons served.
- Meaningful engagement of stakeholders.
- An understanding of extenuating and influencing factors that may impact performance.
- A workforce that is knowledgeable about and engaged in performance measurement and management.
- An investment in resources to implement performance measurement and management.
- Measurement and management of business functions to sustain and enhance the organization.

## **Key Areas Addressed**

- Leadership accountability for performance measurement and management
- Identification of gaps and opportunities related to performance measurement and management
- Input from stakeholders
- Performance measurement and management plan
- Identification of objectives and performance indicators for service delivery
- Identification of objectives and performance indicators for priority business functions
- Personnel training on performance measurement and management

## **Recommendations**

There are no recommendations in this area.

## **1.N. Performance Improvement**

### **Description**

CARF-accredited organizations demonstrate a culture of performance improvement through their commitment to proactive and ongoing review, analysis, reflection on their results in both service delivery and business functions, and transparency. The results of performance analysis are used to identify and implement data-driven actions to improve the quality of programs and services and to inform decision making. Performance information that is accurate and understandable to the target audience is shared with persons served, personnel, and other stakeholders in accordance with their interests and needs.

### **Key Areas Addressed**

- Analysis of service delivery performance
- Analysis of business function performance
- Identification of areas needing performance improvement
- Implementation of action plans
- Use of performance information to improve program/service quality and make decisions
- Communication of performance information

### **Recommendations**

There are no recommendations in this area.

## **Section 2. Quality Individualized Services and Supports**

### **Description**

For an organization to achieve quality services, the persons served are active participants in the planning, implementation, and ongoing review and revision of the services offered. The organization's commitment to quality and the involvement of the persons served spans the entire time that the persons served are involved with services. The service planning process is individualized, establishing goals and measurable objectives that incorporate the unique strengths, abilities, needs, and preferences of the persons served. Services are responsive to the expectations of persons served and their desired outcomes from services, and are relevant to their maximum participation in the environments of their choice.

## 2.A. Program/Service Structure

### Description

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.

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

### Description

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 affect the person's 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.

## 2.D. Employment Services Principle Standards

### Description

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.

Some examples of the quality results desired by the different stakeholders of these services and supports include:

- Individualized, appropriate accommodations.
- A flexible, interactive process that involves the person.
- Increased independence.
- Increased employment options.
- Timely services and reports.
- Persons served obtain and maintain employment consistent with their preferences, strengths, and needs.
- Person served obtains a job at minimum wage or higher and maintains appropriate benefits.
- Person served maintains the job.

### **Key Areas Addressed**

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

### **Recommendations**

There are no recommendations in this area.

## **2.F. Service Delivery Using Information and Communication Technologies**

### **Description**

Depending on the type of program, a variety of terminology may be used to describe the use of information and communication technologies to deliver services; e.g., telepractice, telehealth, telemental health, telerehabilitation, telespeech, etc. Based on the individual plan for the person served, the use of information and communication technologies allows providers to see, hear, and/or interact with persons served, family/support system members, and other providers in or from remote settings (i.e., the person served and provider are not in the same physical location).

The provision of services via information and communication technologies may:

- Include services such as assessment, individual planning, monitoring, prevention, intervention, team and family conferencing, transition planning, follow-up, supervision, education, consultation, and counseling.
- Involve a variety of providers such as case managers/service coordinators, social workers, psychologists, speech-language pathologists, occupational therapists, physical therapists, physicians, nurses, dieticians, employment specialists, direct support professionals, peer support specialists, rehabilitation engineers, assistive technologists, teachers, and other personnel providing services and/or supports to persons served.
- Encompass settings such as:
  - Hospitals, clinics, professional offices, and other organization-based settings.
  - Schools, work sites, libraries, community centers, and other community settings.
  - Congregate living, individual homes, and other residential settings.
- Be provided via fully virtual platforms.

The use of technology for strictly informational purposes, such as having a website that provides information about the programs and services available or the use of self-directed apps, is not considered providing services via the use of information and communication technologies.

### **Key Areas Addressed**

- Written procedures for the use of information and communication technologies (ICT) in service delivery
- Personnel training on how to deliver services via ICT and the equipment used
- Instruction and training for persons served, family/support system members, and others
- Provision of information related to ICT
- Maintenance of ICT equipment
- Emergency procedures that address unique aspects of service delivery via ICT
- Scope of ICT services

### **Recommendations**

There are no recommendations in this area.

### **Consultation**

- Although personnel who deliver services via information and communication technologies receive documented competency-based training on equipment used in service delivery, including hardware and software infection control, it is suggested that steps for infection control be included in the written information and communication technology procedures manual provided to all staff members. As appropriate, EXCEED could implement written procedures to guide personnel on how to instruct clients on equipment used in service delivery, including infection control.

## **Section 3. Employment Services**

### **Description**

An organization seeking CARF accreditation in the area of employment 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 self-direction, self-determination, and self-reliance.
- Self-esteem.
- Community citizenship.
- Increased independence.
- Meaningful activities.
- Increased employment options.
- Employment obtained and maintained.
- Competitive employment.

- Employment at or above minimum wage.
- Economic self-sufficiency.
- Employment with benefits.
- Career advancement.

### **3.A. Employment Planning Services (EPS)**

#### **Description**

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 the person's 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.

Some examples of quality outcomes desired by the different stakeholders of these services include:

- Work interests are explored and identified.
- Recommendations for employment options are appropriate.
- Employment planning reports lead to job goals.
- Transferable work skills and employment barriers are identified.
- Benefits planning is included.
- Services are timely in their delivery.
- Services are cost-effective.
- Individuals served understand recommendations that are made.
- Individuals served identify desired employment outcomes.

#### **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.

### **3.G. Community Employment Services (CES)**

#### **Description**

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 individualized competitive employment, individual placements, contracted temporary personnel services, competitive employment, supported employment, transitional employment, mobile work crews, contracted work groups in the community, 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.

The following service categories are available under Community Employment Services:

- Job Development (CES:JD)
- Employment Supports (CES:ES)

If an organization provides only Job Development or Employment Supports, then it may be accredited for only that service. If it is providing both Job Development and Employment Supports, then it must seek accreditation for both.

Note: In making the determination of what an organization is actually providing in comparison to these service descriptions, these factors are considered: the mission of the services, the program descriptions, brochures and marketing image for these services, and the outcomes of the services.

Depending on the scope of the services provided, some examples of the quality outcomes desired by the different stakeholders of these services include:

- Persons obtain community employment.
- Persons obtain individualized competitive employment.
- Employment matches interests and desires of persons.
- Wages, benefits, and hours of employment achieved as desired.
- Average number of hours worked per week increases.
- Average number of hours worked per week meets the desires of the person served.
- Full-time employment with benefits.
- Transition-age youth move directly from their educational environment into community employment.
- Potential for upward mobility.
- Self-sufficiency.
- Integration.
- Responsive services.
- Safe working conditions.
- Cost-effective for placement achieved.

- Performance level achieved meets requirements of job or position.
- Increase in skills.
- Increase in productivity.
- Increase in hours worked.
- Increase in pay.
- Employment retention.
- Increase in natural supports from coworkers.
- Persons served treated with respect.
- Minimize length of time for supports.
- Type and amount of staff interaction meets needs.
- Employer satisfaction.
- Responsiveness to customers.

Job Development (CES:JD): 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 support for a self-directed job search.

Employment Supports (CES:ES): Employment support services 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

### **Recommendations**

There are no recommendations in this area.

# Program(s)/Service(s) by Location

## **Valley Resource Center Inc. DBA EXCEED**

3550 East Florida Avenue, Suite D  
Hemet, CA 92544

Administrative Location Only

## **EXCEED Mission Grove**

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

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