

CARF Accreditation Report
for
Opportunity Center, Inc. dba
ServiceSource

Three-Year Accreditation



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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 an on-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.

Organization

Opportunity Center, Inc. dba ServiceSource
3030 Bowers Street
Wilmington, DE 19802

Organizational Leadership

Cynthia Sterling, Director Employment Services
Dennis Dapolito, Executive Director
Janet Samuelson, President/CEO

Survey Date(s)

January 29, 2018–January 31, 2018

Surveyor(s)

Jean M. Rommes, Ph.D., Administrative
Joan E. Distler, M.B.A., Program

Program(s)/Service(s) Surveyed

Community Employment Services: Employment Supports
Community Employment Services: Job Development
Employment Planning Services
Employment Skills Training Services
Governance Standards Applied

Previous Survey

Three-Year Accreditation
May 13, 2015–May 15, 2015

Accreditation Decision

Three-Year Accreditation
Expiration: March 31, 2021

Executive Summary

This report contains the findings of CARF's on-site survey of Opportunity Center, Inc. dba ServiceSource conducted January 29, 2018–January 31, 2018. 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, Opportunity Center, Inc. dba ServiceSource demonstrated substantial conformance to the standards. Opportunity Center, Inc. dba ServiceSource provides services throughout the state of Delaware that hold the potential of an employment outcome, including services that are not directly designed to result in employment. The services surveyed were highly individualized and based on the needs, wants, strengths, and abilities of the persons served. The staff members are well trained and enthusiastic about their work and clearly care for the people they work with. The organization provides ongoing follow-along services for the consumers who could benefit from it, but who are not necessarily eligible for such services; these services create stability and positive outcomes over time. The Delaware region management and leadership staff provide guidance and all the supports necessary to create robust programs for employment and community services for Delawareans. Among the staff at all levels, there is evidence of longevity, which provides stability and consistency, along with the newer staff members who provide new ideas and possibilities. Support also comes from the corporate level and includes financial, human resources, technology, risk management, accessibility, and strategic planning support. There is a board member from Delaware who represents the region on the board, and she attended the opening conference of this survey. Members of the corporate staff were present for both the opening and exit conferences of this survey, with others participating by telephone. It is not unusual for the corporate staff to visit the Delaware region regularly, and the staff from the Delaware region visits the corporate offices regularly. The top-down and bottom-up philosophy is evident and has significant, positive effect on the staff, persons served, and the programs and services offered. There are areas for improvement, including enhancing the written procedures for critical incidents, and measuring and analyzing efficiency measures for the skills training program. The staff members at all levels were eager to show what they do and are proud of and very receptive to the consultation and suggestions. There is no doubt that they have the skills to make the very few improvements noted in this report.

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

Opportunity Center, Inc. dba ServiceSource 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 Opportunity Center, Inc. dba ServiceSource was conducted by the following CARF surveyor(s):

- Jean M. Rommes, Ph.D., Administrative
- Joan E. Distler, M.B.A., 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 Opportunity Center, Inc. dba ServiceSource 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
- Employment Skills Training Services
- *Governance Standards Applied*

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 on-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 Opportunity Center, Inc. dba ServiceSource demonstrated the following strengths:

- ServiceSource is fortunate to have a strong, involved, experienced, and well-connected board of directors that is highly invested in the organization. There was a recent review and revision of the committee structure to better meet the needs of the organization. The phrase "generative conversations" was used frequently to

describe how the board discusses new ideas and concepts at board meetings, seeks input from all board members to help develop structure and detail for the idea, or to present new ideas to the board. The board members make opportunities to meet the stakeholders and make appropriate connections for stronger services and partnerships by being present at official functions and events, and by traveling to one of the regional offices for one board meeting a year. The board members work hard to make themselves visible and to demonstrate a top-down approach, while seeking the bottom-up input necessary to make the organization work well. The board members are active on committees, many serving on two, and represent ServiceSource in the community well through their connections and memberships in other organizations.

- The Delaware region has a very strong, experienced board member who represents it well at the board level, while ensuring that she also understands the broad, corporate perspective and the place of the Delaware region in the total corporate picture. She is extremely well connected both with the people who were associated with the Opportunity Center prior to the affiliation with ServiceSource, and with people who hold positions of influence in the state of Delaware. She is able to represent ServiceSource to Delaware and to help the people with disabilities in the state have a voice.
- The Delaware region executive is experienced and respected in both Delaware and at the corporate level, and certainly knows the Delaware disability community well. In this small state, it is possible for him to have conversations with the state's department directors as well as state and federal legislators. In addition to these activities, he is active in the state associations and has served at many levels in these organizations. His background in both business and social services has also served him well.
- The current president/CEO is planning to retire in two years, and the board has developed a very strong succession plan. This has included a complete review of the organizational policies, procedures, structure, board and governance policies and procedures, organization mission and vision, etc. The plan not only includes how the transition will occur, but how the board plans to support the new leader over a two-year period following the transition.
- ServiceSource is led by a strong, experienced executive who has many years of experience with the organization and who is highly regarded at the local, state, and national levels. She is active in a variety of venues, including state and national entities, and makes a point of being visible in the communities where ServiceSource provides services or has contractual obligations. She developed the top-down and bottom-up philosophy, ensures that she often travels to the regional offices and seeks input from both the staff and stakeholders, ensures that the corporate staff and board members have opportunities to travel to regional offices, and provides opportunities for the regional staff to travel to the corporate offices. In addition, she has surrounded herself with experienced leadership at the corporate level, with a clear view that what is done at corporate has to have a positive effect on the regions and what they do. Her understanding of person-centered planning and the importance of providing supports for the programs and services from the corporate level drives all corporate activities and is understood and embraced by the corporate staff.
- Strategic planning is a strength of the organization and is a good example of leadership and information from the top down and bottom up. The five-year strategic plan began with a gathering of senior staff from all regions early in the calendar year. National trends, initiatives, threats, and opportunities were discussed as well as some things that were happening in each region. Regional staff went home to review the overall situation with their staff and to determine what specific things are happening in their areas and what their priorities would be. This information was returned to the corporate staff members who pulled together the results and developed nine broad areas of concern: information, education, advocacy, services coordination, employment, community living, recreation and avocation, technology, and transportation. These were confirmed by regional staff as being appropriate and including their areas of concern. The overall strategic plan discusses both the national environment as well as the regional environments to give context and perspective to the plan and paints a broad, overarching view of goals in each area. Each region then developed its own objectives in each of the goals that were appropriate to its region to form the basis for the regional action plan. The action plan not only includes individual action steps taken to complete the objectives, but also appears in the job descriptions as they are reviewed or individual goals set during the performance evaluation process for staff members who have been assigned specific tasks in the action plan. When the plan was established and written,

the plan went on the road and was presented in a variety of ways to stakeholders in all the regions. Elements of it appear on the website in a variety of different places and the results of the first year's work will be reported out to all regions and stakeholders at the end of the fiscal year. All major plans and activities ServiceSource engages in are intended to be driven by the strategic plan. In talking with staff responsible for various plans, programs, initiatives, and areas included in the ASPIRE to Excellence section, many conversations included the phrase, "as specified in the strategic plan" or "as Delaware's part of the strategic plan" or "our part of the strategic plan". It is clear that the strategic plan is embedded in the corporate culture and drives the activities of the organization at all levels.

- The ServiceSource Delaware region leadership and program staff are mission and vision driven. They are constantly reevaluating the programs and services to be sure they are offered in the most meaningful and significant way possible. A recent change from a strong, in-facility work program to the consumers participating in employment programs or the new Riverfront Program, is an example of well-planned change designed to make programs and services relevant and effective for the participants. The new programs or services are usually somewhere in a planning stage because of some need or gap that was noted by the persons served, staff, or other stakeholders. A spirit of cooperation and collaboration between and among the corporate and regional staff was evident. Funds for new or expanding services are often made available through the foundation, or fit into funds that already exist. This can-do approach is appreciated and was commented on by the funders in the Delaware region.
- The staff members are involved with a variety of state and local organizations to both promote and represent ServiceSource. As Delaware is a small state, the staff members are very familiar with the directors of various state departments with which they interact, as well as the representatives in the area offices. In addition, the staff belongs to a variety of local and state organizations that are involved with people with disabilities and have either held or currently hold leadership positions in a number of organizations.
- Staff retention appears to be a great strength for the Delaware region. Many staff members have years of longevity with the company, some extending well before the affiliation with ServiceSource. Benefits are a key component of this in Delaware and they are thoroughly discussed with potential staff members in the interviews. Although wages may not be the highest in the area, the benefits shape a well-rounded package and were mentioned by staff as a reason to stay with the organization.
- The mentoring program for personnel who are interested in upward mobility is a strength of ServiceSource and has been used to great advantage in the Delaware region. A number of staff members who were interviewed talked about the opportunities available as well as the supports and training offered by both regional and corporate staff in helping interested personnel achieve desired promotions within the organization. There is also the opportunity for movement between the regions if desired, as well as the possibility of making connections outside of ServiceSource using the business contacts generated by the federal contracts.
- The training program for staff is very strong. A Learning Management Software (LMS) program has been developed that identifies required training by position and tracks all required and additional training taken. Transcripts can be viewed and the training requirements are part of the performance evaluation process. The staff appreciates the opportunities and takes advantage of nonrequired training. There is a leadership training program to help personnel who are interested in upward mobility acquire the necessary skills for advancement.
- ServiceSource Delaware region enjoys a stable financial position with sufficient reserves to achieve the desired outcomes. There are detailed financial reports available at all levels to ensure appropriate monitoring of the financial position for programs and services, which also ensures that regional financial staff is adhering to high ethical and fiscal accounting standards. The Delaware region is fortunate to have an abundance of foundations and private funding sources available to it because it is located in Delaware. It takes advantage of these funding sources and has a grant writer on staff. Between them, the CEO and the grant writer maintain a spreadsheet of all foundations, where they have current grants, when grant applications are due for each of the potential funders, and what areas of interest the foundations support. It is easy to see where the Delaware region might apply for funds for projects and funds are sought regularly. It is not always successful, but has built a good reputation over the years and has received multiple grants from several of the foundations.

ServiceSource is fortunate to have a foundation that is available to help fund services that would not necessarily be possible with current reimbursement levels. The Delaware region has taken advantage of this opportunity when local funds were not available for a particular project.

- ServiceSource Delaware region seeks input using a variety of different mechanisms, including surveys, individual participant planning meetings, an open-door policy, staff meetings, participant meetings, open houses, and focus groups. Issues that can be addressed immediately are often completed within 24 hours if not sooner, and more complex issues often make their way into various other appropriate plans, such as the technology, risk management, accessibility, or strategic plans.
- The Delaware regional offices are currently located in a manufacturing area of the city. The building is old but attractively furnished and well maintained. The organization is well aware that as its services have changed and it no longer has a vibrant in-house work program, its space needs have changed. Although it has retained some in-house work for providing evaluation areas for the FrameWORK for Success program participants, the space needed for this is minimal. It has located a building in a different area of town in an office complex and is making preparations for a move in June. This well-coordinated and planned effort is a major strength.
- The one-page summary of annual accomplishments and milestones developed by the Delaware region staff is an excellent way to report the organization's accomplishments to the stakeholders and others. There is a lot of information contained, with the highlights noted in red, which makes these stand out nicely. The pictures or charts and graphs, along with the formatting make this a very effective tool that can be used with many different groups. Although there is a lot of information, it is easy to pick out the high points and the stakeholders can see the things they are interested in easily and quickly.
- The organization has continued to develop positive relationships with the community employers, which have benefited both the persons served and the community at large. Due to the ongoing efforts of organization's staff, the local businesses have expressed a strong commitment to partner with ServiceSource to ensure appropriate job matches while meeting the consumers' career goals. The ServiceSource employment staff has fostered strong relationships with the area employers to offer the consumers various employment options and opportunities.
- The organization is commended for its continuing assurance in meeting the consumers' needs. The consumers, parents, guardians, and other stakeholders expressed a high level of satisfaction with the service options available to the consumers. They also indicated their appreciation for the staff members, who have exceeded their initial expectations by going above and beyond in support of the consumers.
- The employment staff members are commended for their ongoing creativity related to job development and ongoing support services. Many stakeholders expressed their appreciation for the ServiceSource staffs' ongoing efforts to ensure employment success for the persons served.
- The staff members display a high degree of compassion and care for the persons served. They are committed to networking with the funding sources and other stakeholders while maintaining positive relationships that foster a stable and ongoing partnerships for the organization.
- All stakeholders reported ongoing efforts by ServiceSource to ensure that the consumers served are satisfied with their overall services and employment outcomes.
- ServiceSource is recognized and commended for continuing to provide needed services to the consumers and families at no cost to ensure that the consumers continue to maintain their current employment to achieve their long-term, vocationally related goals.
- The organization is commended for its proactive process to encourage ongoing training for the direct service staff members as Financial Coaching and Community Work Incentive Coordinators (CWICs). These trainings and the CWIC certification have been beneficial to the consumers served and their families, along with other community stakeholders.

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

Recommendations

There are no recommendations in this area.

Consultation

- Although the corporate plans for succession are very robust and well documented, the succession planning for the Delaware region is equally robust, but not well documented. It is suggested that the region's succession plans also be in writing to allow for easy access in the event they are needed.
- The process for dealing with allegations of violations of ethics and corporate compliance policies indicates that any investigation proceeds as "expeditiously" as possible, clearly implying that things are to be done quickly. Opportunity Center is encouraged to revise the language to provide a specific timeframe for investigations. The phrase "under ordinary circumstances" could be used to acknowledge that things may take longer under some conditions.
- The corporate compliance program is somewhat complicated by the fact that the myriad of federal contracts that ServiceSource has requires compliance measures that are included in large documents that detail those requirements by contract. The compliance at the corporate level includes corporate compliance as it is defined in the standards, and there is a corporate document that outlines the corporate plan. It is suggested that the Delaware region develop a region-specific corporate compliance plan and that a corporate compliance officer for the region be named in its plan. The regional corporate compliance officer would be the individual who would monitor and report on corporate compliance matters, conduct the corporate compliance risk assessments for the region, and provide staff training on the role of the corporate compliance officer; the region's procedures for dealing with waste, fraud, abuse, and other wrongdoing; and the internal auditing activities the organization employs.

1.B. Governance (Optional)

Description

The governing board should provide effective and ethical governance leadership on behalf of its owners'/stakeholders' interest to ensure that the organization focuses on its purpose and outcomes for persons served, resulting in the organization's long-term success and stability. The board is responsible for ensuring that the organization is managed effectively, efficiently, and ethically by the organization's executive leadership through defined governance accountability mechanisms. These mechanisms include, but are not limited to, an adopted governance framework defined by written governance policies and demonstrated practices; active and timely review of organizational performance and that of the executive leadership; and the demarcation of duties between the board and executive leadership to ensure that organizational strategies, plans, decisions, and actions are delegated to the resource that would best advance the interests and performance of the organization over the long term and manage the organization's inherent risks. The board has additional responsibilities under the domain of public trust, and as such, it understands its corporate responsibility to the organization's employees, providers, suppliers, and the communities it serves.

Key Areas Addressed

- Ethical, active, and accountable governance
- Board composition, selection, orientation, development, assessment, and succession
- Board leadership, organizational structure, meeting planning, and management
- Linkage between governance and executive leadership
- Corporate and executive leadership performance review and development
- Executive compensation

Recommendations

There are no recommendations in this area.

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

- 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.

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

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

Recommendations

There are no recommendations in this area.

1.E. Legal Requirements

Description

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

Key Areas Addressed

- Compliance with all legal/regulatory requirements

Recommendations

There are no recommendations in this area.

Consultation

- It is suggested that the organization define which confidential administrative documents will be kept at the regional level and which will be kept at the corporate level. Further, it is suggested that Opportunity Center staff determine which records may be kept in hard copy and where (offices, locked file cabinets, safety deposit boxes, etc.), and consider who can have access and under what circumstances. Consideration could also be given to documents that are kept digitally.

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

- 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.

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

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

Recommendations

There are no recommendations in this area.

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

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

Recommendations

1.H.9.e.

Although the incident reporting process for accidents and incidents for the employment programs requires that the team meet to determine things such as root causes and trends, it does not specifically reference a timely debriefing. A timely debriefing could include discussion regarding the root causes and trends, but could also review what various individuals did or said during the incident and how those actions influenced the outcome of the incident, providing both the staff and persons served a chance to objectively review their behavior and understand the impact that it had. It is recommended that the procedures regarding critical incidents include a provision for timely debriefings following critical incidents. It could also provide guidance in regard to who is to be included at what points in the process.

Consultation

- Although there are several places where written procedures for emergencies such as natural disasters and utility failures occur, the ones that appear to be used for training are the ones where each type of emergency appears in a separate box and the various steps are outlined. It is suggested that boxes be developed for both natural disasters and utility failures so all emergency procedures have a box on the form.
- It is suggested that the Opportunity Center staff review the evacuation routes with the persons who use wheelchairs to determine if they are posted at a height that is understandable from a wheelchair height. It might also consider the possibility of adding Braille signage.
- The forms used for emergency drills have ample space for analysis of how the drill went and what might be done differently to improve performance. Some drill reports were well documented and well analyzed, while others were much less so. It is suggested that all personnel responsible for reporting drills might benefit from some additional training in regard to the analysis and that the complete drill reports might be used as good examples. Perhaps the staff person responsible for the drill forms could be responsible for developing this part of the training program.
- The organization could consider the possibility of helping the persons served develop their own emergency information that they could carry with them. Most smartphones have apps for this type of information, including medications and allergies.
- The Delaware region has two separate incident reporting processes: one for its employment programs and another for its Developmental Disability Services (DDS) programs. It is suggested that it consider one procedure that could marry the two internal procedures, the CARF standards, and any internal ServiceSource requirements.
- Although prevention is mentioned in the policy regarding accidents and incidents, and what requires a critical incident report, Opportunity Center is encouraged to add a paragraph at the beginning of the procedure to discuss all the training that the staff is given that is designed to prevent critical incidents from happening in the first place, and that the focus of the program is on prevention of such incidents. This could make the connection between all the training and critical incidents much stronger and place the focus on prevention.
- Although sexual assault would certainly require an incident report as an unusual event, it is suggested that it be added to the list of incidents that require an incident report.

1.I. Human Resources

Description

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

- It is suggested that the turnover data be broken down by region and by program within the regions. This might provide data that could certainly be important for the regions, and might provide interesting data for the corporate level as well.

1.J. Technology

Description

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
- Written procedures for the use of information and communication technologies (ICT) in service delivery, if applicable
- Training for personnel, persons served, and others on ICT equipment, if applicable
- Provision of information relevant to the ICT session, if applicable
- Maintenance of ICT equipment in accordance with manufacturer recommendations, if applicable
- Emergency procedures that address unique aspects of service delivery via ICT, if applicable

Recommendations

There are no recommendations in this area.

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

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

Recommendations

There are no recommendations in this area.

Consultation

- Although the policies on the rights of the persons served certainly imply that neglect would not be tolerated, it is suggested that the organization add the word *neglect* to the policies and the information contained in the consumer handbook.
- The Delaware region's grievance policies list the president and CEO of ServiceSource as the last appeal level and she is considered to be outside the organization. It is suggested that rather than have the president of the parent company be the last appeal source in the process, the CEO of the regional office be the last internal appeal available, and that appropriate outside entities be offered for any additional appeal. These could include the state vocational rehabilitation agency, the Delaware Division of Social Services, or the Delaware agency on protection and advocacy responsible for disability rights.

1.L. Accessibility

Description

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.

Consultation

- Although the staff often reports barriers based on conversations with the persons served, it is suggested that Opportunity Center consider hosting a focus group of parents/guardians, persons served, staff, and interested individuals from the community to discuss barriers found by both the individuals and families in accessing services in the community. As they discuss the problems associated with simple tasks such as grocery shopping, getting a haircut, going to a movie, or going out for a meal, new barriers might be identified or others viewed in a new light.
- It is suggested that the organization add a column to the grid used to document the accessibility plan called "progress." As activities occur, these could be added in this column, showing a running account of the activities that have been completed toward removal of each barrier.

1.M. Performance Measurement and Management

Description

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

Recommendations

1.M.6.b.(2)

There were no efficiency measures for the two skills training programs. It is recommended that the Delaware region determine and measure efficiency for the skills training program and add these to the other outcomes that are measured for the program. The staff keeps individual data on the persons served that could be aggregated and provides targets for both programs (directly from the budget) based on actuals. The possibility of measuring time authorized for a service versus actual time billed for the service could provide data helpful in negotiating rates with the funder and provide meaningful data that could be helpful in demonstrating the good fiscal management of the Delaware region program.

Consultation

- The Delaware region is encouraged to present data for each program seeking accreditation in the aggregate, rather than breaking them out by location or funding source. This could give accurate data regarding the health of the program overall, while location or funding source information may inform or influence the data analysis.
- Although satisfaction information is kept and recorded, it is suggested that this information be shown directly on the data grids for all programs. Including satisfaction data could provide a complete picture of the program. It is further suggested that if satisfaction from other stakeholders includes data from several groups, the groups be identified.
- At the present time, rehabilitation has the responsibility of collecting the data. It is suggested that a job title be substituted to clearly identify the individual(s) responsible for collecting the data.

1.N. Performance Improvement

Description

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

Recommendations

1.N.1.b.(2)(b)

There are no efficiency measures kept in the outcomes data for the skills training programs. Once these are set and measured, these should be analyzed for performance in the written performance analysis.

Section 2. Quality Individualized Services and Supports

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 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.

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

Recommendations

There are no recommendations in this area.

Consultation

- It is suggested that the organization provide more comprehensive training to the employment consultants on how to market the Work Opportunity Tax Credits (WOTCs) that are available to local employers. Additional marketing efforts could offer more financial benefits to the community employment partners.

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 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.

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.

Consultation

- The organization could benefit by partnering with other local vocational providers to share job leads and other resources available within the employment market. Collaborating with other vocational agencies could offer additional employment options within the local employment sector while also encouraging community partnerships.

3.E. Employment Skills Training Services (EST)

Description

Employment skills training services are organized formal training services that assist a person seeking employment to acquire the skills necessary for specific jobs or families of jobs. Such services can be provided at job sites in the form of apprenticeships, on-the-job training, and/or volunteer situations; within formal and organized training and educational settings (such as community colleges and trade and technical schools); or within the organization.

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

- Persons show improvement in skill level.
- Specific marketable skills are developed.
- Persons served achieve employment in the area of training.
- Persons secure employment with benefits.
- Persons retain employment.
- Training is completed in a timely manner.
- Training is cost-effective for the results produced.

Key Areas Addressed

- Formal training services
- Skills, attitude, and work behaviors development/reestablishment

Recommendations

There are no recommendations in this area.

Consultation

- It is suggested that all consumers in the employment skills training services receive a timeline of course schedules and training timelines. Although a majority of these participants did have such timelines, the program staff is encouraged to monitor timelines and training schedules more closely so all of the participants are able to plan and fully understand the proposed timelines.

3.G. Community Employment Services

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 (please refer to the program descriptions and applicable standards):

- 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. If any clarification is needed, please contact your CARF resource specialist. There is no charge for consultation.

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.

Consultation

- The ServiceSource staff members are encouraged to provide additional information to the employers regarding tax credits and other possible benefits for hiring the consumers served by the organization.

Program(s)/Service(s) by Location

Opportunity Center, Inc. dba ServiceSource

3030 Bowers Street
Wilmington, DE 19802

Community Employment Services: Employment Supports
Community Employment Services: Job Development
Employment Planning Services
Employment Skills Training Services
Governance Standards Applied

OCI Dover Site

165 Commerce Way
Dover, DE 19904

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