

**CARF Accreditation Report**  
**for**  
**Employment Source, 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](http://www.carf.org/contact-us).

**Organization**

Employment Source, Inc. dba ServiceSource  
600 Ames Street  
Fayetteville, NC 28301

**Organizational Leadership**

Andrew S. Rind, Executive Director  
Elizabeth Torsell, M.S.Ed., Rehabilitation Program Director  
Janet Samuelson, President/CEO

**Survey Date(s)**

February 26, 2018–February 27, 2018

**Surveyor(s)**

Jean M. Rommes, Ph.D., Administrative  
Lisa B. Padgett, Program

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

Community Employment Services: Employment Supports  
Community Employment Services: Job Development  
Community Integration  
*Governance Standards Applied*

**Previous Survey**

Three-Year Accreditation  
May 14, 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 Employment Source, Inc. dba ServiceSource conducted February 26, 2018–February 27, 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, Employment Source, Inc. dba ServiceSource demonstrated substantial conformance to the standards. ServiceSource provides quality, individualized services to the participants in its employment and community programs. The organization is supported by an active board and especially by a board member from North Carolina who has been very instrumental in the development of the Friendship House project, along with the corporate staff members who visit the organization regularly to provide guidance, leadership, and support to the North Carolina region. The regional executive and leadership staff are well trained and experienced, clearly invested in their organization, and in working with the persons served. The staff members at all levels demonstrated their excitement for their work and are clearly appreciated by the persons served, parents, guardians, funders, and the community at large. The Friendship House program and the effort in the community to fund the project have resulted in greater name recognition and support for the organization. The overall commitment of ServiceSource as a whole and by Employment Source to the CARF accreditation process and standards were evident in the way that conformance to the standards was demonstrated and consultation was received. There were no areas noted for improvements, although there were many opportunities for consultation and discussion of local, state, and national issues; research; and best practices and evidence-based practices. It is clear that ServiceSource has the resources to continue to adhere to the CARF standards and maintain the quality services it currently provides.

Employment Source, Inc. dba ServiceSource appears likely to maintain and/or improve its current method of operation and demonstrates a commitment to ongoing quality improvement.

**Employment Source, 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 Employment Source, Inc. dba ServiceSource was conducted by the following CARF surveyor(s):

- Jean M. Rommes, Ph.D., Administrative
- Lisa B. Padgett, 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 Employment Source, 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
- Community Integration
- *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 Employment Source, 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 create 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 annually. 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.

- There is a board member who lives in North Carolina and is very active with the North Carolina region of ServiceSource, especially with the Friendship House project. She uses her local connections along with her personal and professional influence in a very positive manner, making introductions and providing the local history to the staff members who are new to the area. She works closely with the North Carolina region, but is also very aware of her responsibility to the corporation as a whole. Previous board members remain in touch with the organization and help with a variety of community and development activities.
- The current corporate president/CEO is planning to retire in two years, and the board has developed a very strong succession plan. The plan includes a complete review of the organizational policies, procedures, structure, board and governance policies and procedures, the organization's 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 other stakeholders, ensures that the corporate staff and board members have opportunities to travel to the 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.
- The executive of ServiceSource (Florida region) has been in his current position for about four years. Under his leadership, the organization has grown significantly, both in terms of AbilityOne® contracts and the number of participants employed. He brings significant experience from the healthcare industry and has been able to use these skills in ways that have responded to changing demographics, such as serving more participants with mental illnesses rather than intellectual disabilities, and working with youth transitioning from school to work.
- 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. The regional staff members went home to review the overall situation with their staff and 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 and education, advocacy, services coordination, employment, community living, recreation and avocation, technology, transportation, and enterprise solutions. These were confirmed by the regional staff members as being appropriate and including their areas of concern. The overall strategic plan discusses both the national and 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 within each of the goals that were appropriate to their 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 the 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 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.

- One of the major strengths of ServiceSource is the rich bank of resources that each of the affiliated entities brings to the table and the cross pollination that regularly takes place as the corporate staff and board members visit each regional site on a regular basis and as the regional staff visits the corporate site. The strategic planning sessions are where much of the cross pollination begins, but it continues well beyond that, and most importantly, is supported and encouraged by the corporate leadership. Evidence of this was clear in the development of the Work Incentives Planning and Assistance (WIPA) programs by the North Carolina and Florida regions, and the interest in the Friendship House program that is at the groundbreaking stage in North Carolina. There are doubtless many examples where one region was able to use the expertise developed in another region to expand and improve the programs and services.
- The North Carolina leadership staff members are mission and vision driven. They regularly review their programs to see if they are being run in the most efficient and effective way possible. They have developed new programs to meet perceived needs, including a WIPA program and Pre-Employment Transition Services (PETS). The leadership staff members are involved in a variety of state and local organizations, sometimes taking leadership roles. They also make themselves visible at the AbilityOne contract sites to ensure that they are known, visible, and approachable.
- The North Carolina region enjoys a stable and growing financial position. Over the past several years, its portfolio of funds managed has grown considerably, allowing it some funds for program expansion and new initiatives. The North Carolina region can also access the ServiceSource Foundation for additional funds as needed.
- The staff training program is very strong. A Learning Management System (LMS) program has been developed that identifies the organization's 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 these opportunities and takes advantage of non-required training. There is a leadership training program to help personnel interested in upward mobility acquire the necessary skills for advancement.
- Staff retention appears to be a strength for the North Carolina region despite the fact that Fayetteville has a very transient population. Many staff members have years of longevity with the organization, some extending before the affiliation with ServiceSource, but there are also staff members who are newer and who bring different perspectives and new ways of doing things. This combination promotes both stability and innovation. The organization promotes from within and hires and promotes individuals with disabilities.
- The North Carolina region employs many ways of getting input from various groups of stakeholders, including meetings with the advisory groups, meetings with the staff and consumers, meeting with each employment site for AbilityOne contracts, and attending chamber of commerce meetings and professional meetings. The organization can act on the information it gets by either developing new programs, like Friendship House, or revamping a current program, like the day program, to meet the expressed wishes and needs of the participants.
- The North Carolina region began to receive more referrals of people with mental illness issues and found that it was not able to work as effectively in helping the participants achieve placement in jobs. After researching the situation, it sought and achieved fidelity certification, which involved the staff learning new skills and building relationships with the mental health centers for needed support. This initiative improved placement to 53 percent of the participants reaching 90 days of employment and beyond. This is an excellent example of the organization's response to change.
- All major plans and activities that ServiceSource engages in are intended to be driven by the strategic plan. In talking with the staff responsible for various plans, programs, initiatives, and areas included in the Aspire to Excellence section, many conversations included the phrases, "as specified in the strategic plan," or "as North Carolina'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 organization's activities at all levels.



- One of the items noted in the risk management plan for the North Carolina region was its large workers' compensation claims that negatively influenced its workers' compensation rating. Several new initiatives were put in place, including a major emphasis on safety with daily briefings on safety in the workplace, regular training on safety issues specific to the workplace, better onboarding orientation to safety, and supervisors being held accountable for the accidents that did occur. The workers' compensation liability was reduced from approximately \$500,000 to \$22,000 in four years.
- Another of ServiceSource's strengths is the emphasis on safety and security. This is evidenced by comprehensive written procedures and training for the staff and persons served.
- The organization is committed to the personal and professional development of the persons served through internal initiatives such as the Participant Mentoring Program that seeks to pair the participants in a partnership through which one person shares his/her knowledge, skills, and perspective to help the participant develop and achieve his/her personal and professional goals.
- ServiceSource is commended for collaborating with funding partners, including Veterans Affairs (VA), Alliance Behavioral Health Care, and vocational rehabilitation to diversify funding and provide innovative supported employment referral services for veterans with disability and mental illness through the Warrior Bridge.
- The organization has recently launched PETS in an effort to increase evidence-based individual placement supports and WIPA services for youth in transitioning from high school to adult services.
- ServiceSource is committed to providing evidence-based individual placement and support services based on the Fidelity Model to ensure effective placement and retention in community employment for individuals with significant barriers such as mental illness, homelessness, and incarceration. Since implementing the Fidelity Model in partnership with the Department of Justice, job retention has improved by 50 percent.
- Dedicated and creative employment staff routinely customizes the services and supports to each participant in order to ensure the best possible outcomes for each participant.
- The community employers are highly satisfied with the quality of support provided to their employees hired through ServiceSource and also showed appreciation for the added recruiting resources that ServiceSource provides.
- The organization shows commitment to supporting the participants to achieve competitive employment. An example of this is a woman working at the VA Medical Center who just resigned to take a new job with the Department of Social Services.
- In the past couple of years, ServiceSource has sought input from its stakeholders on how to revitalize its day program, and it is commended for listening to this input and revamping its day program services to meet the community integration needs of the persons served in this program. The emphasis now is on connecting the participants to meaningful locations, activities, and events in the community such as volunteering at the food bank, helping out at the Cape Fear Botanical Garden, and working out regularly at the YMCA. In addition, the families show great appreciation for the social events hosted by ServiceSource, such as the Valentine's dance and Christmas dances that provide needed socialization opportunities.

## 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. Employment Source, Inc. dba ServiceSource received no recommendations from this survey. This accomplishment is achieved on approximately 3 percent of CARF surveys.

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**

- The compliance procedure at the corporate level includes corporate compliance as it is defined in the CARF standards, and there is a corporate document that outlines the corporate plan. It is suggested that the North Carolina 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 could be the individual monitoring and reporting on corporate compliance matters; conducting corporate compliance risk assessments for the region; providing staff training on the role of the corporate compliance officer and the region's procedures for dealing with waste, fraud, abuse, and other wrongdoing; and supporting the region's internal auditing activities.

## 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 would be kept at the regional level and which at the corporate level. Further, it is suggested that the staff determine which records would 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**

There are no recommendations in this area.

### **Consultation**

- ServiceSource is encouraged to reference the Continuation of Operations Plan (COOP) in the evacuation procedures and indicate that this is where the identification of temporary shelter, identification and continuation of essential services, emergency phone numbers, and notification of the appropriate authority are located.
- Although the organization has drill reports covering all the areas specified in the CARF standards on an annual basis, some are reported and analyzed much better than others. When describing desktop drills, it is suggested that the situation discussed be described and that the discussion that ensues after the situation is explained be documented, with special notes regarding things that might have led to a problem had the drill

been an actual drill and any training or other remediation necessary. When analyzing an actual drill, it is suggested that a discussion of what happened during the drill be included to demonstrate why or why not remediation is necessary.

- When the persons served go in the community, the emergency information is contained in a notebook that goes in a locked bag in the vehicle. Employment services is encouraged to think about how the emergency personnel might access this information in the event of a serious accident where no one would be able to tell the emergency personnel where this is located. The employment services personnel are also encouraged to help the participants learn to carry their own emergency information, if possible. There is an app included with iPhone® cell phones that could be useful for people who have them.
- There are two procedures used for critical incidents, one for accidents and Occupational Safety and Health Administration (OSHA)-related incidents, and the other for more behavioral incidents. It is suggested that one policy be developed that covers both situations. The introductory information could include much more information regarding the prevention of critical incidents (the organization participates in a number of trainings designed specifically for that purpose), and that the timely debriefing section be developed further.

## 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.

## 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

- It is suggested that ServiceSource consider creating a video of the rights of the persons served that could be used with the participants who better comprehend by hearing and seeing the rights being acted out. The participants could be included as actors demonstrating the infringement of rights and the appropriate way to treat others.
- The way the introduction to the grievance procedure is written clearly implies that a formal complaint is one that is written; it is suggested that this be stated in so many words. It is also suggested that the introduction to the policy offer assistance to the participants who might have difficulty writing.

## 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 ServiceSource does a good job of assessing accessibility needs, it is suggested that holding focus groups specifically designed around accessibility issues might offer new and different ways of looking at barriers encountered by the persons served.
- Fundraising is already being done to help offset the costs of some of the programs. It is suggested that fundraising be added as a way of dealing with the lack of financial support from the entities that purchase the services.

## **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**

There are no recommendations in this area.

### **Consultation**

- It is suggested that ServiceSource also keep data on the number of hours worked per week at hire. It may wish to break out various groups of persons served and have different targets for the various groups. For example, AbilityOne hires versus non-AbilityOne, participants from the day program, or other groupings such as veterans.

## **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**

There are no recommendations in this area.

## **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.

### **Consultation**

- Even though the Participant Mentoring Program is not a program being surveyed, it is a service to the persons served, and ServiceSource may want to consider adding eligibility and selection criteria to the program design to ensure equal access to all applicants.

## **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.

## **2.E. Community Services Principle Standards**

### **Description**

An organization seeking CARF accreditation in the area of community services assists the persons and/or families served in obtaining access to the resources and services of their choice. The persons and/or families served are included in their communities to the degree they desire. This may be accomplished by direct service provision or linkages to existing opportunities and natural supports in the community.

The organization obtains information from the persons and/or families served regarding resources and services they want or require that will meet their identified needs, and offers an array of services it arranges for or provides. The organization provides the persons and/or families served with information so that they may make informed choices and decisions.

The services and supports are changed as necessary to meet the identified needs of the persons and/or families served and other stakeholders. Service designs address identified individual, family, socioeconomic, and cultural needs.

Expected results from these services may include:

- Increased or maintained inclusion in meaningful community activities.
- Increased or maintained ability to perform activities of daily living.
- Increased self-direction, self-determination, and self-reliance.
- Increased self-esteem.

## **Key Areas Addressed**

- Access to community resources and services
- Enhanced quality of life
- Community inclusion
- Community participation

## **Recommendations**

There are no recommendations in this area.

# **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.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**

- While visiting an AbilityOne contract site, a person served mentioned experiencing neck pain due to the workstation not being set up ergonomically. ServiceSource may want to consider adding ergonomic evaluations to its work-site inspection checklists to ensure that the staff and persons served at contract sites do not become injured on the job.

## Section 4. Community Services

### Description

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

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

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

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

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

### 4.G. Community Integration (COI)

#### Description

Community integration is designed to help persons to optimize their personal, social, and vocational competency to live successfully in the community. Persons served are active partners in determining the activities they desire to participate in. Therefore, the settings can be informal to reduce barriers between staff members and persons served. An activity center, a day program, a clubhouse, and a drop-in center are examples of community integration services. Consumer-run programs are also included.

Community integration provides opportunities for the community participation of the persons served. The organization defines the scope of these services and supports based on the identified needs and desires of the persons served. This may include services for persons who without this option are at risk of receiving services full-time in more restrictive environments with intensive levels of supports such as hospitalization or nursing home care. A person may participate in a variety of community life experiences or interactions that may include, but are not limited to:

- Leisure or recreational activities.
- Communication activities.
- Spiritual activities.
- Cultural activities.
- Pre-vocational experiences.
- Vocational pursuits.

- Volunteerism in the community.
- Educational and training activities.
- Development of living skills.
- Health and wellness promotion.
- Orientation, mobility, and destination training.
- Access and utilization of public transportation.
- Interacting with volunteers from the community in program activities.
- Community collaborations and social connections developed by the program (partnerships with community entities such as senior centers, arts councils, etc.).

### **Key Areas Addressed**

- Opportunities for community participation

### **Recommendations**

There are no recommendations in this area.

### **Consultation**

- As the organization continues to revamp its day program services and increase community integration activities, ServiceSource may want to consider developing a more formalized curriculum that could include increased use of technology for communication purposes. For instance, iPad® devices are affordable, accessible, and portable devices that could be used to promote communication and literacy. The organization is encouraged to consider a smart television to help the persons served look up and plan community activities. It is also encouraged to consider providing adult art materials, such as canvases and acrylic and watercolor paints, and connecting aspiring artists to community art classes and activities. Pinterest could be a helpful resource to find creative and affordable projects and materials for crafts, cooking, photography, and gardening. For reading and computer literacy, the organization is encouraged to check out [www.gcflearnfree.org](http://www.gcflearnfree.org), a website created by Goodwill® for the purpose of training the persons served and staff persons in multiple areas of life skills, computer skills, and literacy. In addition, the organization is encouraged to consider applying to the ServiceSource Foundation for support in enhancing the day program services.

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

## Employment Source, Inc. dba ServiceSource

600 Ames Street  
Fayetteville, NC 28301

Community Employment Services: Employment Supports  
Community Employment Services: Job Development  
Community Integration  
*Governance Standards Applied*