CARF Accreditation Report

for

Pathways Abilities Society

Three-Year Accreditation

Contents

About CARF

CARF is an independent, non-profit 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

Pathways Abilities Society
123 Franklyn Road
Kelowna BC V1X 6A9
CANADA

Organizational Leadership

Charisse Daley, Executive Director
Leslie Munro, Home Share & Activity QA Manager

Survey Number

129420

Survey Date(s)

March 2, 2020–March 4, 2020

Surveyor(s)

Kathy Leuelling, Administrative
Liz Kellough, Program

Program(s)/Service(s) Surveyed

Community Employment Services: Employment Supports
Community Employment Services: Job Development
Community Housing
Community Integration
Host Family/Shared Living Services
Organizational Employment Services
Governance Standards Applied

Previous Survey

April 26, 2017–April 28, 2017
Three-Year Accreditation

Accreditation Decision

Three-Year Accreditation
Expiration: May 31, 2023

Executive Summary

This report contains the findings of CARF's on-site survey of Pathways Abilities Society conducted March 2, 2020–March 4, 2020. 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.
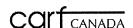
Accreditation Decision

On balance, Pathways Abilities Society demonstrated substantial conformance to the standards. Pathways Abilities provides excellent services for adults with disabilities in Kelowna, British Columbia. The organization has experienced recent growth through a merger with another local provider. Pathways Abilities should address the opportunities for improvement in this report, including those noted as repeated recommendations from its previous surveys. Areas for improvement include revising the written procedures that address handling funds of persons served; updating the risk management plan; ensuring that personal vehicles used to transport persons served are equipped with emergency procedures, first aid supplies, and emergency equipment; conducting unannounced tests of each emergency procedure at least annually on each shift at each location; ensuring that the written analysis of performance improvement includes areas needing improvement, action plans to address improvement needs, and actions taken to improve performance; ensuring that Home Share contractors receive competency-based training on medications of the individual served in the home; ensuring that Home Share monitoring visits include a private discussion with the individuals served in the homes; and ensuring that areas needing improvement identified during Home Share monitoring are documented and addressed. There is every confidence that Pathways Abilities has the capability and resources to address the areas for improvement noted and to further enhance the quality of its operations, programs, and services.

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

Pathways Abilities Society 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 Pathways Abilities Society was conducted by the following CARF surveyor(s):

- Kathy Leuelling, Administrative
- Liz Kellough, 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 Pathways Abilities Society 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 Housing
- Community Integration
- Host Family/Shared Living Services
- Organizational Employment 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 Pathways Abilities Society demonstrated the following strengths:

- Pathways Abilities is commended for implementation of the governance standards. The board of directors, many of whom have significant tenure with the organization, are committed to the mission and success of the organization. Governance policies are well developed and cover a full range of responsibilities. Board members are active in strategic planning, finance, and succession planning. The board maintains a good working relationship and open communication with the executive director.

- The leadership team is dedicated and demonstrates enthusiasm for the work of the organization. Many of the management and supervisory staff members have worked with the organization for several years and have benefited from the organization's commitment to promote from within. The management team is committed to ongoing performance improvement and was receptive to feedback provided. A culture of openness was evident, not just during the survey process, but in observations of interactions during the course of the day.

- Pathways Abilities has developed an excellent succession planning process. Input is solicited from supervisors at the management meeting to identify employees with potential for increased responsibilities. Development activities are provided to identified employees to help prepare for future promotion. The executive director leads the process and reports on succession planning to the board of directors several times throughout the year.

- The strategic planning process is extensive and incorporates both environmental research and input from individuals served, staff, board members, and other stakeholders. The plan identifies successes, challenges, trends, demographics, strategic directions, goals, and action plans. The strategic plan is shared on the website and ShareVision.

- Pathways Abilities' Social Ventures Program has developed a range of different social enterprises that offer opportunities for those involved to gain valuable work skills, to participate in hourly work at minimum wage or better, and to use experience gained to move forward into competitive community employment. Of note are two enterprises that have evolved through strong, mutually reciprocal partnerships. Bikeways operating in partnership with the city of Kelowna's lost and stolen bike program offers workers the opportunity to learn bike mechanics and repair and to take pride in refurbishing bikes for all ages for resale. This business offers a valuable service to the community. Pathways Abilities' partnership with Columbia Bottle Depot is another vibrant business operation that employs a number of individuals who take great pride in the work they do, picking up, accepting shipments, and sorting bottles for recycle.

- The Home Share program has developed a very comprehensive and easy-to-follow questionnaire that managers complete with each person seeking Home Share placement in order to help the person think through his/her desired lifestyle, support needs, and preferred living situations.

- The Home Share program providers speak highly of the ways in which Home Share program managers support them in their roles and are available to them to answer questions and respond to concerns or issues that arise. The program has a number of long-term placements attesting to the quality of matches that managers make with providers. Individuals served observed living in several of these homes appear to enjoy very positive relationships with their providers and appear to be very comfortable in their living situation.

- Pathways Abilities has nurtured very positive working relationships with local oversight bodies that reflect its commitment to a person-centred approach. Leadership is proactive in bringing forward any questions, concerns, and/or observations to the various bodies so that they can plan together to address concerns and/or emerging needs. The organization is also reported to be very responsive to and quick to follow through on any feedback or recommendations made and very flexible when considering how to meet the needs of individuals served within its services and/or to ensure that they have access to the supports they need.

- Community employers express appreciation for the role the Integrated Career Opportunities program has played in helping them to fill workplace needs by creating customized positions that integrate well into their work settings and providing appropriate levels of support to ensure the success of these new positions. They know they can reach out to employment staff members at any time to address any questions or concerns and can count on a quick and helpful response from them. As one employer reported, "Through this program, we have good employees we know we can count on to do the job well. It is great for our business."

- Activity services at both Franklyn Road and West Kelowna are a buzz of activity with people coming and going as they join one another in community outings, volunteer activities, and planned activities at the centres. Supplementing these daytime services, Pathways Abilities offers social recreation activities during the evenings and weekends as well as an innovative travel club program that is gearing up this week for a trip to Mexico with a group of participants who have been involved in planning and saving their money for this trip.

- Bouvette and Old Meadows Road residences are welcoming homes in community neighbourhoods where both the indoor and outdoor spaces are tailored to meet the needs of the individuals served sharing the home together. In addition to their personal living spaces that reflect the unique styles of each individual served, there are common areas where individuals served can interact with others in the household, host guests, and engage in personal activities.

- Individuals served throughout Pathways Abilities appear to enjoy very strong relationships with their direct support staff and with leadership. Not only are many eager to meet visitors and share the things they like about the activities within which they are involved but they also seem very comfortable asserting themselves, bringing forward any changes they would like to see and/or setting new goals for themselves. It is clear that individuals served feel confident, comfortable, and well supported to make choices for themselves and to make their wishes known – a true sign of person-centred practice in action.

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 non-conformance to the standards; it is intended to offer ideas that the organization might find helpful in its ongoing quality improvement efforts. The organization is not required to address consultation.

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

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

Section 1. ASPIRE to Excellence®

1.A. Leadership

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

Key Areas Addressed

■ Leadership structure and responsibilities
■ Person-centred philosophy
■ Organizational guidance
■ Leadership accessibility
■ Cultural competency and diversity
■ Corporate responsibility
■ Organizational fundraising, if applicable

Recommendations

There are no recommendations in this area.

Consultation

- The organization has experienced growth over the last several years. As is typical when in a growth modality, policies, procedures, technology, and documentation are developed to address a new program or regulatory requirement. As a result, program and business operations may become inefficient. It is suggested that the organization review all policies and procedures for duplication. The same process could be completed for documentation requirements in each program. Identifying opportunities to streamline procedures and documentation could improve efficiency of operations and ensure that procedures are user-friendly.

- Pathways Abilities has multiple policies that provide specific guidance regarding various aspects of the code of ethics. It is suggested that one comprehensive policy be developed in order to ensure that each employee, board member, and volunteer has a full understanding of his/her responsibility for ethical conduct.

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 selection, orientation, development, leadership, structure, and performance
■ Linkage between governance and executive leadership
■ Board meetings and committee work
■ Executive leadership development, evaluation, and compensation

Recommendations

There are no recommendations in this area.

Consultation

- The exempt compensation policy includes a section regarding executive compensation. This policy, along with a second document regarding the compensation review, addresses base pay, benefits, market comparisons, and approval procedures. It is suggested that the organization develop a separate policy for executive compensation in order to combine all aspects of the executive compensation policy into one document that clearly defines the executive compensation philosophy and mix, market comparisons, and approval process.

1.C. Strategic Planning

Description

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

Key Areas Addressed

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

Recommendations

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

- Collection of input
- Integration of input into business practices and planning

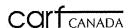### Recommendations

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

Recommendations

There are no recommendations in this area.

1.F. Financial Planning and Management

Description

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

Key Areas Addressed

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

Recommendations

1.F.9.b.
1.F.9.c.
1.F.9.g.
1.F.9.h.
The organization has a written policy that addresses procedures for handling funds of individuals served. It is recommended that the policy be revised to include how the individual will give informed consent for purchases and access the record of his/her funds. The policy should also address provision of an account reconciliation to the individual served at least monthly and the return of funds upon transition/exit from the program.
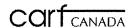
1.G. Risk Management

Description

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

Key Areas Addressed

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

Recommendations

1.G.1.a.(6)
1.G.1.a.(7)
Pathways Abilities has a comprehensive risk management plan that identifies areas of risk, loss exposure, methods to rectify identified exposure, and actions to reduce risk. It is recommended that the risk management plan be amended to include reporting of results of actions to reduce risk and inclusion of risk reduction in performance improvement activities. This could be accomplished by adding a column to the current table for reporting results. The organization might also consider including results for a three-year period in order to analyze trends. Adverse trends could be identified and included in performance improvement plans.

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

- Competency-based training on safety procedures and practices
- Emergency procedures
- Access to first aid and emergency information
- Critical incidents
- Infection control
- Health and safety inspections

Recommendations

1.H.7.a.(1)
Unannounced drills are conducted at each location. Although most locations have only one shift, there are two community homes that provide support on two shifts, including overnight supports. As noted in the previous report, there is no evidence that unannounced drills are conducted during the overnight hours. It is recommended that the organization conduct unannounced drills at least annually during the overnight hours for each emergency procedure. Evacuation or movement to a safe zone requires additional time when the individuals served are sleeping. Drills conducted during sleeping hours could help identify areas for improvement and necessary training specific to the shift.

1.H.12.e.
1.H.12.h.
1.H.12.j.
Transportation is provided for persons served in organization-owned vehicles and personal staff vehicles. Although organization-owned vehicles are equipped with first aid supplies, safety equipment, and emergency procedures, these items are not available in personal staff vehicles. It is recommended that any vehicle used to transport persons served have first aid supplies, safety equipment, and a copy of the written emergency procedures available. The organization might consider setting up a grab-and-go bag with these items that employees can take with them when using their personal vehicle for transportation of persons served.

Consultation

- Because earthquakes are natural to this region, as part of its ongoing health and safety practices, Pathways Abilities is encouraged to monitor its storage of heavy objects on top of cabinets where they might pose a risk of falling and causing injuries during ground tremors.

- The building at 123 Franklyn Road has numerous exits, all of which are clearly marked. Maps of the building layout are posted throughout the building that show exit locations along with the location of fire extinguishers and first aid supplies. It is suggested that the posted maps be revised to clearly identify the primary and secondary evacuation routes to be taken from each specific location.

- Safety equipment and first aid supplies along with personal items are not secured in many of the vehicles. It is suggested that the organization consider ways to secure items that might become a projectile in the event of an accident.

1.I. Workforce Development and Management

Description

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

Key Areas Addressed

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

Recommendations

There are no recommendations in this area.

Consultation

- Recruitment and retention of qualified staff are a universal challenge for organizations supporting persons with disabilities in the community. Many organizations have worked to find ways to identify new employees who are not a good match earlier in their employment tenure. One method that has been successful in determining future success is the use of a mentor position. The mentor, typically a long-term direct support staff with an excellent performance history, takes responsibility for on-the-job training of all new direct support staff. This role could serve two functions: 1) ensuring that training is consistent and reflects the organizational culture, mission, vision, and procedures and 2) providing feedback to managers about any early signs that the employee may not be successful.

- Measurable goals have been added to the performance evaluation and are evident in personnel files. In order to engage employees in the success of persons served, program outcomes, and strategic goals, the organization might consider linking individual employee goals to program outcomes. One method that could be used is an employee passport tri-fold that can be carried by the employee. The passport would include the organization's strategic goals, program goals for the employee's department, and the employee's individual goals. This type of goal linking may help employees develop a greater understanding of their role in the successful outcomes for persons served and program services.

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

- Ongoing assessment of technology and data use
- Technology and system plan implementation and periodic review
- Technology policies and procedures
- Written procedures for the use of information and communication technologies (ICT) in service delivery, if applicable
- ICT instruction and training, if applicable
- Access to ICT information and assistance, if applicable
- Maintenance of ICT equipment, if applicable
- Emergency procedures that address unique aspects of service delivery via ICT, if applicable

Recommendations

There are no recommendations in this area.

Consultation

- Pathways Abilities has done a good job of implementing the 2019 technology standards for assessment, plans, policies, disaster recovery, and training. With technology taking on a greater role in operations and program services, the organization is encouraged to continue development of the technology plan and policies to provide more specific guidelines for employees regarding use of technology in the workplace.

- The organization completed a test of the business continuity/disaster recovery plan for technology earlier this year. It is suggested that future tests for business continuity/disaster recovery be conducted for the organization as a whole. One method that can be used is a tabletop drill of a major disaster that would impact both program and business operations. A disaster scenario is developed and sent to each manager or staff member responsible for responding to emergencies. Each person comes to the table with the actions he/she would take in response to the scenario. A discussion follows to identify any gaps or additional actions needed. This type of test could ensure that staff members responsible for business operations and technology have a full understanding of their role with program operations in the event of a major disaster.

1.K. Rights of Persons Served

Description

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

Key Areas Addressed

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

Recommendations

There are no recommendations in this area.

1.L. Accessibility

Description

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

Key Areas Addressed

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

Recommendations

There are no recommendations in this area.

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

- Data collection
- Establishment and measurement of performance indicators

Recommendations

There are no recommendations in this area.

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

- Analysis of performance indicators in relation to performance targets
- Use of performance analysis for quality improvement and organizational decision making
- Communication of performance information

Recommendations

1.N.1.c.(1)
1.N.1.c.(2)
1.N.1.c.(3)
A written analysis is completed that includes results compared to performance targets for business functions, service access, efficiency, effectiveness, and satisfaction for each program. It is recommended that the annual Review and Analysis report identify areas needing performance improvement, result in an action plan to address the improvements needed to reach established or revised performance targets, and outline actions taken or changes made to improve performance.

Section 2. Quality Individualized Services and Supports

Description

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

2.A. Program/Service Structure

Description

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

Key Areas Addressed

- Services are person-centred 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

- It is suggested that, as part of its consent-for-release-of-information form, Pathways Abilities specify the exclusions to consent that are required by law so individuals served are informed of when and why information may be required to be exchanged with police, government, or others. Plain language versions of these exclusions may be found online and could be especially helpful in supporting individuals served to make informed choices about information they share.

2.B. Individual-Centred 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-centred 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.

Consultation

- The Home Share program has done a tremendous job in its work to transition Home Share providers to its services following the recent merger with another organization. It has introduced a clear structure for monitoring and supporting each provider that seems to be working well for all parties. As part of this work, it is encouraged to move forward with its plan to transition from the current system where providers have been charged to develop person-centred plans with each individual served to a more collaborative approach involving Home Share managers that ensures that meaningful goals are set for each individual served and there is a clear system for tracking progress on these goals. The care plan model it is in the process of developing may be a good way forward to help support this transition.

- Due to inconsistencies in how and where staff members report progress on the goals they are supporting with the individuals in their services, Pathways Abilities may want to look at ways to streamline the systems currently in place for tracking goal progress on ShareVision. Additionally, managers may want to coach staff to use the "Indicator of Success" section of the ShareVision Goal form in more meaningful ways so everyone involved in supporting the goal has a better understanding of the intention of the goal for the individual served and what outcomes he/she hopes to achieve; i.e., If I walk for 20 minutes three times a week, what will be different for me and how will I know this goal has been successful?

- As a way to present the individual service plan in more meaningful ways for the individuals served, Pathways Abilities might consider alternate formats that highlight the individual served, his/her strengths and interests and the goals he/she wants to pursue using photos, pictures, simple phrases, and/or sign language. The posters on display at the Day Services in West Kelowna featuring a photo of each individual served along with images that represent his/her interests could be a starting point for a more creative and accessible presentation of each individual's plan.

2.C. Medication Monitoring and Management

Key Areas Addressed

■ Current, complete records of medications used by persons served
■ Written procedures for storage and safe handling of medications
■ Educational resources and advocacy for persons served in decision making
■ Physician review of medication use
■ Training and education for persons served regarding medications

Recommendations

There are no recommendations in this area.

2.D. Employment Services Principle Standards

Description

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

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

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

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

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

Key Areas Addressed

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

Recommendations

There are no recommendations in this area.

2.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.

Consultation

- To support the work that programs already do to ensure that individuals served get out and about in the community, Pathways Abilities might want develop some new metrics that help it to measure the quality of interactions individuals served enjoy in community. The Presence to Contribution continuum (Helen Sanderson Associates) might be a good tool to help staff members think through and more strategically support individuals served to start to build meaningful and satisfying relationships with specific community members in the places they choose to participate.

Section 3. Employment Services

Description

An organization seeking CARF accreditation in the area of employment services assists the persons served through an individualized person-centred 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.F. Organizational Employment Services (OES)

Description

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

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

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

- Movement to individualized competitive employment.
- Movement to an integrated environment.
- Increased wages.
- Pay at or above minimum wage.
- Increased skills.
- Increased work hours.
- Minimized downtime with meaningful activities available.
- Exposure to and availability of a variety of jobs.
- Increased ability to interact with others as part of a professional team and to resolve interpersonal issues appropriately.

Key Areas Addressed

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

Recommendations

There are no recommendations in this area.

Consultation

▪ Social Ventures bottle sorting operations at the Columbia Bottle Depot has a lovely staff room with photos of each of the workers on display. As part of the program's support for each individual served to explore next steps, including other work opportunities, staff members might consider encouraging each person to post and update the goals he/she is working on as a way not only of keeping these goals front and centre as they work but also of inspiring each other by learning about and possibly supporting each other's goals. This practice may also be a great way of celebrating accomplishment of each goal as completed ones come down and new ones go up.

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 labour market. Persons are supported as needed through an individualized person-centred 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.

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 labour 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 behaviours 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 non-work 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 Integrated Career Opportunities Program engages each new job seeker in a "discovery" as his/her way of learning about and getting a clear picture of possible directions for customized job development. This results in a well-documented and informative profile of the job seeker. It is suggested that, in addition to this detailed profile, the program consider developing a one-page profile that captures key findings from discovery that may include pictures, photos, and visual images that may be more accessible to the job seeker and easier to use as a quick snapshot for referral during job development.

- To better understand and track each individual's job progress and support needs, the Integrated Career Opportunities Program might want to consider revamping the ShareVision form it uses to document each placement made so it can track the dates of transition to different levels of support on the job and any advancements made within the workplace in terms of wage increases, increased hours, expanded work functions, etc. Tracking this information in one place on ShareVision may make required reporting easier to gather while also offering useful information on trends to help in service planning.

Section 4. Community Services

Description

An organization seeking CARF accreditation in the area of community services assists the persons served through an individualized person-centred 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.E. Host Family/Shared Living Services (HF/SLS)

Description

Host family/shared living services assist a person served to find a shared living situation in which he/she is a valued person in the home and has supports as desired to be a participating member of the community. An organization may call these services a variety of names, such as host family services, shared living services or supports, alternative family living, structured family care giving, family care, or home share.

Getting the person in the right match is a critical component to successful host family/shared living services. The organization begins by exploring with the person served what constitutes quality of life for him/her and identifies applicant providers who are a potential match with the person's identified criteria. The person served makes the final decision of selecting his or her host family/shared living provider.

Safety, responsibility, and respect between or amongst all people in the home are guiding principles in these services. Persons are supported to have meaningful reciprocal relationships both within the home, where they contribute to decision making, and the community. The service provider helps the person served to develop natural supports and strengthen existing networks. Relationships with the family of origin or extended family are maintained as desired by the person served. The provider supports the emotional, physical, and personal well-being of the person.

Persons develop their personal lifestyle and modify the level of support over time, if they so choose. The provider encourages and supports the person served to make his or her own decisions and choices.

The host family/shared living provider does not necessarily have to be a family, as it could be an individual supporting the person. In this program description and these standards, provider refers to the individual(s) supporting the person served. Although the "home" is generally the provider's home or residence, it may also be the home of the person served.

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

- Quality of life as identified by the person served is enhanced.
- Increased independence.
- Increased community access.
- Persons served choose whom they will live with and where.
- Participation of the persons in the community.
- Community membership.
- Support for personal relationships.
- Increased natural supports.
- Strengthened personal networks.
- Supports accommodate individual needs.
- Persons feel safe.
- Persons feel that the supports they need/want are available.
- Persons decide where they live.
- Persons feel valued.
- Persons have meaningful relationships.
- Persons develop natural supports.
- Persons participate in their community.

Key Areas Addressed

- Appropriate matches of non-family participants with homes
- Contracts that identify roles, responsibilities, needs, and monitoring
- Needed supports
- Community living services in a long-term family-based setting
- Sense of permanency

Recommendations

4.E.5.e.
Although the Home Share program provides Home Share contractors with an orientation to the medications for the individuals served placed in their homes, it is recommended that the program ensure that all contractors, who will have a role in medications, participate in competency-based training on medication management. This might be achieved by using the existing orientation/training materials it provides followed by an observation of medication administration to test for competency in all the steps.

4.E.7.b.(1)
4.E.7.e.
Although Home Share managers have contact with and check in on occasion with individuals placed with providers in the Home Share program, it is recommended that as part of their routine monitoring of each provider, Home Share managers ensure that they have direct discussions with the individuals served. Managers might want to develop a checklist of routine questions that help individuals served reflect on and provide feedback on their living situation to help guide these discussions. Additionally, although the Home Share program has a good system in place for documenting results of monitoring visits with providers that specifies any areas where follow-up action is required, it is recommended that the program ensure that areas identified as needing performance improvement are consistently addressed. This practice could be supported by developing a filtered view on ShareVision that allows managers to see all monitoring visits where follow-up action has not yet been completed so managers can be sure to track and document that these areas have been addressed by the provider.

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 centre, a day program, a clubhouse, and a drop-in centre 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 centres, arts councils, etc.).

Key Areas Addressed

- Opportunities for community participation

Recommendations

There are no recommendations in this area.
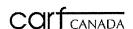
4.H. Community Housing (CH)

Description

Community housing addresses the desires, goals, strengths, abilities, needs, health, safety, and life span issues of the persons served, regardless of the home in which they live and/or the scope, duration, and intensity of the services they receive. The residences in which services/supports are provided are typically owned, rented, leased, or operated directly by the organization, or may be owned, rented, or leased by a third party, such as a governmental entity. Providers exercise control over these sites in terms of having direct or indirect responsibility for the physical conditions of the facility.

Community housing is provided in partnership with individuals. These services/supports are designed to assist the persons served to achieve success in and satisfaction with community living. They may be temporary or long-term in nature. The services/supports are focused on home and community integration and engagement in productive activities. Community housing enhances the independence, dignity, personal choice, and privacy of the persons served. For persons in alcohol and other drug programs, these services/supports are focused on providing sober living environments to increase the likelihood of sobriety and abstinence and to decrease the potential for relapse.

Community housing programs may be referred to as group homes, halfway houses, three-quarter way houses, recovery residences, sober housing, domestic violence or homeless shelters, and safe houses. These programs may be located in rural or urban settings and in houses, apartments, townhouses, or other residential settings owned, rented, leased, or operated by the organization. They may include congregate living facilities and clustered homes/apartments in multiple-unit settings. These residences are often physically integrated into the community, and every effort is made to ensure that they approximate other homes in their neighbourhoods in terms of size and number of individuals.

Community housing may include either or both of the following:

- Transitional living that provides interim supports and services for persons who are at risk of institutional placement, persons transitioning from institutional settings, or persons who are homeless. Transitional living is typically provided for six to twelve months and can be offered in congregate settings that may be larger than residences typically found in the community.
- Long-term housing that provides stable, supported community living or assists the persons served to obtain and maintain safe, affordable, accessible, and stable housing.

The residences in which Community Housing services are provided must be identified in the survey application. These sites will be visited during the survey process and identified in the survey report and accreditation decision as a site at which the organization provides a Community Housing program.

Key Areas Addressed

- Safe, secure, private location
- Support to persons as they explore alternatives
- In-home safety needs
- Access as desired to community activities
- Options to make changes in living arrangements
- System for on-call availability of personnel

Recommendations

There are no recommendations in this area.

Program(s)/Service(s) by Location

Pathways Abilities Society

123 Franklyn Road
Kelowna BC V1X 6A9
CANADA

Community Integration
Host Family/Shared Living Services
Governance Standards Applied

Old Meadows Road

647 Old Meadows Road
Kelowna BC V1W 1S3
CANADA

Community Housing

Pathways Abilities Society

2476 Main Street
West Kelowna BC V4T 1Z1
CANADA

Community Integration

Pathways Abilities Society - Bouvette

2835/2837 Bouvette
Kelowna BC V1Y 3K5
CANADA

Community Housing

Pathways Abilities Society - St. Paul

1216 St. Paul Street
Kelowna BC V1Y 2C8
CANADA

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