



**CARF Accreditation Report**  
**for**  
**Penticton and District Society for**  
**Community Living**

**Three-Year Accreditation**



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

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

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

## **Organization**

Penticton and District Society for Community Living  
180 Industrial Avenue West  
Penticton BC V2A 6X9  
CANADA

## **Organizational Leadership**

Tarra Kenney, Interim CEO  
Tony L. Laing, CEO

## **Survey Number**

157251

## **Survey Date(s)**

August 17, 2022–August 19, 2022

## **Surveyor(s)**

Camille Lagueux, Administrative  
Sha Azedi, MA, MS, PhD, Program  
Nathaniel Rogers, Jr., 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  
Respite Services  
Services for Children and Youth: Child and Adolescent Services  
Supported Living

## **Previous Survey**

September 9, 2019–September 11, 2019  
Three-Year Accreditation

## **Accreditation Decision**

**Three-Year Accreditation**  
**Expiration: June 30, 2025**

# Executive Summary

This report contains the findings of CARF's site survey of Pentiction and District Society for Community Living conducted August 17, 2022–August 19, 2022. 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, Pentiction and District Society for Community Living demonstrated substantial conformance to the standards. Pentiction and District Society for Community Living (PDSCL) has offered programs and services to clients with diverse abilities in Pentiction and the surrounding communities for almost 65 years. The programs and services are offered by leadership team members and personnel who, at all levels of the organization, demonstrate a commitment to its mission. They ensure that the services are designed to meet the needs of the clients and enhance the quality of their lives. The programs and services offered by PDSCL are highly valued by funding and referral sources, family members of the clients, and other stakeholders. The organization is to be commended for its quick response to ensure that the services were not disrupted at the height of the COVID-19 pandemic. The organization's opportunities for improvement are primarily in its business functions and include enhancement of the risk management plan, enhancement of annual reviews of contracted services, development and implementation of procedures for the safety of personnel and clients when delivering services in sites that are not owned/leased or controlled/operated by PDSCL, and a timely debriefing following critical incidents. Additional opportunities for improvement were also noted in the workforce development and management standards, including the implementation of procedures for performance appraisal for all groups that comprise the workforce. Other areas for improvement were also noted with respect to the development and implementation of a comprehensive performance measurement and management plan and system and plan and the documented analysis of service delivery and business function at least annually. Under its service delivery practices, PDSCL should ensure that the individualized service plan is shared with others (as appropriate), that wage payment practices are communicated with clients in organizational employment services, and that services for children and youth provide or arrange for educational opportunities for family to learn about a variety of topics. Both leadership and staff members were receptive and open to the consultations and feedback offered throughout the survey process. They appear to have the willingness and capacity to address the areas for improvement.

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

**Penticton and District Society for Community Living 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 Penticton and District Society for Community Living was conducted by the following CARF surveyor(s):

- Camille Lagueux, Administrative
- Sha Azedi, MA, MS, PhD, Program
- Nathaniel Rogers, Jr., 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 Penticton and District Society for Community Living 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
- Respite Services
- Services for Children and Youth: Child and Adolescent Services
- Supported Living

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

## **Representations and Constraints**

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

## **Survey Findings**

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

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

## Areas of Strength

CARF found that Penticton and District Society for Community Living demonstrated the following strengths:

- PDSCL has been supporting clients with diverse abilities living in the city of Penticton and surrounding communities for almost 65 years. What started in 1958 with a group of dedicated parents that wanted to ensure their children received an education is today a dynamic organization that provides a multitude of programs to clients with intellectual disabilities that includes adult day programs, community outreach, home shares, supported employment services, and residential services. Through all of the services it offers, PDSCL embodies its mission to enhance the lives of the clients.
- PDSCL is complimented for the extraordinary tenure of its leadership team. Most of the leadership members have been with PDSCL for 20 years or more, with some of the members having 30 years of service with the organization. Almost all of the leadership team members have worked in various other capacities within the organization prior to assuming their leadership positions and their understanding of the work being done has created a strong foundation as the organization continues to grow and diversify its services.
- The board of directors of PDSCL is committed to the mission and values of the organization. The board supports the chief executive officer and leadership team in their provision of quality services. The board is complimented for ensuring that there is representation for and a voice for the clients by having family members on the board. During the COVID-19 pandemic, the board met virtually and returned to conducting in-person meetings in early 2022.
- The organization's primary funding and referral source was complimentary of the services provided by PDSCL. PDSCL was described as being excellent at problem solving, open and transparent in communication, and genuinely committed to ensuring that each client has the best possible quality of life. It was also shared that the organization's reporting is on time, and its person-centred planning book was described as "outstanding." It was further stated that PDSCL provides "exceptional services to individuals" and that, for employees of PDSCL, proving services is not "just a job."
- The organization's main site is a well-maintained facility that provides a safe and healthy environment for clients and employees. There is evidence to suggest that regular maintenance, upgrading, and accessibility issues are consistently addressed. The safety protocols that were enacted throughout the COVID-19 pandemic serve as further evidence to suggest that the organization is committed to safety. The facility is decorated with artwork that has been created by the clients attending the programs. The artwork is striking and attractive, and it is a tangible way to honour the clients in the programs.
- In addition to the organization's website, PDSCL has a very dynamic social media page where clients can find a monthly calendar with activities, general information, news, and events.
- PDSCL is to be commended for being the recipient of a professionally produced YouTube video that was sponsored by Telus. This wonderful testament to the organization features several of the clients and is a moving tribute toward their journeys.
- The organization appears to be financially solvent and makes good financial decisions that ensures its long-term stability. The organization has been able to diversify its funding revenue, is adept at receiving grants, and has developed partnerships and collaborations with other organizations and networks that support its business.
- PDSCL employs many warm, competent, and respectful staff members. Throughout the survey process, the staff members demonstrated compassion, patience, enthusiasm, and pride in the supports they provide.

- The stakeholders and community partners were complimentary of the staff members for their responsiveness and professionalism.
- The organization is to be commended for caring for clients with challenges. It is known that the organization's leadership believes that each person deserves an opportunity to live abundantly. There is no fear of client behaviour or medical history, and the organization enthusiastically embraces each new client. The opportunity to enhance the lives of the clients is provided through social and community activities.
- PDSCL is acknowledged for its client-first attitude. The clients shared that they feel safe and respected.
- Community stakeholders and clients consider PDSCL to be a premier program, which results in the organization having a very positive reputation and impact on the communities it serves. When the stakeholders were asked to provide a description of the organization's strengths, they described the organization as "exceptional," "excellent," "flexible," "a blessing," "client centred," "highly competent," "caring," "helpful," and "awesome."
- The homes of the residential programs are practical, safe, and appreciated by the clients. The atmosphere of each home reflects warmth and coziness. The clients are given total control over their environments, and this is evidenced by the personalization of the bedrooms in each home.
- The staff members demonstrate dedication, respect, and fairness. They were described as being collaborative, supportive, and effective by stakeholders. There appears to be excellent rapport between the staff members and clients. The staff members extend themselves beyond their assigned responsibilities and are always available to the clients and partners. The staff members believe in the organization's mission and are truly client driven.
- Clients in the employment programs were highly complementary of the support they receive from PDSCL.
- The employment program enjoys a wide variety of activities, with projects involving a bike shop and a wood shop. The clients are engaged in meaningful employment activities when attending the workshops.
- The clients are involved in a variety of physical and sporty activities at PDSCL.
- The parents were highly appreciative of all the support and services they receive from the organization.
- PDSCL has developed a comprehensive person-centred format for its individual support plans that include concepts, tools, and skills.

## 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**

##### **1.A.3.g.**

The identified leadership is urged to guide ongoing performance improvement.

##### **1.A.6.a.(6)(b)**

PDSCL's corporate responsibility efforts should include written ethical codes of conduct in service delivery, including personal fundraising.

### **1.C. Strategic Planning**

#### **Description**

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

#### **Key Areas Addressed**

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

## **Recommendations**

### **1.C.3.a.**

### **1.C.3.c.**

Although PDSCL shares its strategic plan with personnel, the organization is urged to also share its strategic plan, as relevant to the specific group, with clients and other stakeholders.

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

### **Description**

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

### **Key Areas Addressed**

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

### **Recommendations**

There are no recommendations in this area.

## **1.E. Legal Requirements**

### **Description**

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

### **Key Areas Addressed**

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

### **Recommendations**

There are no recommendations in this area.

## **1.F. Financial Planning and Management**

### **Description**

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

### **Key Areas Addressed**

- Budgets
- Review of financial results and relevant factors
- Fiscal policies and procedures

- Reviews of bills for services and fee structures, if applicable
- Review/audit of financial statements
- Safeguarding funds of persons served, if applicable

## **Recommendations**

There are no recommendations in this area.

## **1.G. Risk Management**

### **Description**

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

### **Key Areas Addressed**

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

### **Recommendations**

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

It is noted that the organization's risk management plan identifies broad categories of risk, specific loss exposures, how to rectify exposures, actions to reduce risk, and who is responsible to monitor the actions taken. However, it is recommended that the organization implement a risk management plan that also includes analysis of loss exposures.

#### **1.G.4.b.**

#### **1.G.4.c.**

PDSCL conducts a comprehensive assessment on an annual basis of the home share contractors. However, as some of the services delivered by the program seeking accreditation are provided under contract with another organization or individual, documented reviews of the contract services should ensure that they follow all applicable policies and procedures of the organization and ensure that they conform to CARF standards applicable to the services they provide.

## **1.H. Health and Safety**

### **Description**

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

### **Key Areas Addressed**

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

## Recommendations

### 1.H.8.a.(1)

### 1.H.8.a.(2)

### 1.H.8.b.(1)

### 1.H.8.b.(2)

### 1.H.8.b.(3)

### 1.H.8.b.(4)

### 1.H.8.b.(5)

As the organization provides services in locations that are not owned/leased or controlled/operated by the organization, PDSCL should implement written procedures that address safety at the service delivery site for clients and personnel, including consideration of any emergency procedures that may already be in place at the service delivery site; the physical environment, including accessibility, of the service delivery site; basic needs in the event of an emergency; actions to be taken in the event of an emergency; and provisions for communication by personnel while providing services regarding decisions to continue or discontinue services.

### 1.H.10.e.

The organization should implement written procedures regarding critical incidents that include timely debriefings conducted following critical incidents.

## Consultation

- The organization is encouraged to implement written procedures regarding transportation of clients during inclement weather.

## 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 backgrounds/credentials/fitness for duty
- Workforce engagement and development
- Performance appraisals
- Succession planning

### Recommendations

#### 1.I.1.

The organization is urged to document the composition of its workforce, including all human resources involved in the delivery, oversight, and support of the programs/services seeking accreditation.

#### 1.I.2.d.

Workforce development and management practices should reflect the organization's performance measurement and management system.

**1.I.5.a.(4)**

**1.I.5.a.(5)**

**1.I.5.a.(6)**

Onboarding and engagement activities should include orientation that addresses the organization's performance measurement and management system, risk management plan, and strategic plan.

**1.I.7.a.(1)**

**1.I.7.a.(2)**

**1.I.7.b.**

**1.I.7.c.**

Although some job descriptions contain the required competencies needed to perform the job duties, it is not evident in all job descriptions. It is, therefore, recommended that workforce development activities consistently include documentation of competencies to support the organization in the accomplishment of its mission and goals and to meet the needs of the clients. Workforce development activities should also include documented assessment of competencies and documentation of timeframes/frequencies related to the competency assessment process.

**1.I.8.a.**

**1.I.8.b.**

**1.I.8.c.**

**1.I.8.d.**

**1.I.8.e.**

**1.I.8.f.**

**1.I.8.g.**

**1.I.8.h.**

Although the organization's written procedures for performance appraisal states that performance appraisals are to be done on an annual basis and that the appraisal is to be completed with a supervisor, it does not address the criteria against which people are being appraised, documentation requirements, measurable goals, sources of input, and opportunities for development. It is recommended that the organization also implement written procedures for performance appraisal that address the identified workforce, the criteria against which people are being appraised, involvement of the person being appraised, documentation requirements, timeframes/frequencies related to the performance appraisal process, measurable goals, sources of input, and opportunities for development.

## **1.J. Technology**

### **Description**

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

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

### **Key Areas Addressed**

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

- Written procedures for the use of information and communication technologies (ICT) in service delivery, if applicable
- ICT instruction and training, if applicable
- Provision of information related to ICT, if applicable
- Maintenance of ICT equipment, if applicable
- Emergency procedures that address unique aspects of service delivery via ICT, if applicable

## **Recommendations**

### **1.J.4.a.**

#### **1.J.4.b.(1)**

#### **1.J.4.b.(2)**

#### **1.J.4.b.(3)**

#### **1.J.4.b.(4)**

#### **1.J.4.b.(5)**

#### **1.J.4.b.(6)**

### **1.J.4.c.**

A test of the organization’s procedures for business continuity/disaster recovery should be conducted at least annually; be analyzed for effectiveness, areas needing improvement, actions to address the improvements needed, implementation of the actions, whether the actions taken accomplished the intended results, and necessary education and training of personnel; and be evidenced in writing, including the analysis.

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

The foundation for successful performance measurement and management includes:

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

### Key Areas Addressed

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

## Recommendations

### 1.M.1.b.

The leadership is urged to demonstrate accountability for performance measurement and management in business functions.

### 1.M.2.a.(1)

### 1.M.2.a.(2)

### 1.M.2.a.(3)

### 1.M.2.b.

### 1.M.2.c.

### 1.M.2.d.

### 1.M.2.e.

### 1.M.2.f.

### 1.M.2.g.

The organization is urged to identify gaps and opportunities in preparation for the development or review of a performance measurement and management plan, including consideration of input from clients, personnel, and other stakeholders; the characteristics of the clients; expected results; extenuating and influencing factors that may impact results; the comparative data available; and communication of performance information and technology to support implementation of the performance measurement and management plan.

- 1.M.3.a.(1)**
- 1.M.3.a.(2)(a)**
- 1.M.3.a.(2)(b)**
- 1.M.3.a.(2)(c)**
- 1.M.3.a.(2)(d)**
- 1.M.3.a.(2)(e)**
- 1.M.3.a.(3)(a)**
- 1.M.3.a.(3)(b)**
- 1.M.3.a.(3)(c)**
- 1.M.3.a.(3)(d)**
- 1.M.3.a.(4)**
- 1.M.3.a.(5)**
- 1.M.3.a.(6)(a)**
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- 1.M.3.a.(6)(c)**
- 1.M.3.a.(7)**
- 1.M.3.a.(8)(a)**
- 1.M.3.a.(8)(b)**
- 1.M.3.a.(9)(a)**
- 1.M.3.a.(9)(b)**
- 1.M.3.a.(9)(c)**
- 1.M.3.a.(9)(d)**
- 1.M.3.a.(9)(e)**
- 1.M.3.b.**
- 1.M.3.c.**

It is recommended that PDSCL implement a performance measurement and management plan that addresses collection of relevant data on the characteristics of the clients; for each program/service seeking accreditation, identification of measures for service delivery objectives, including results achieved for the clients (effectiveness), experience of services received and other feedback from the clients, experience of services and other feedback from other stakeholders, resources used to achieve results for the clients (efficiency), and service access; the collection of data about the clients at the beginning of services, appropriate intervals during services, the end of services, and point(s) in time following services; identification of priority measures determined by the organization for business function objectives; the extent to which the data collected measure what they are intended to measure (validity); the process for obtaining data in a consistent manner (reliability), that will be complete, and that will be accurate; extenuating or influencing factors that may impact results; timeframes for the analysis of data and communication of results; and how data are collected, data are analyzed, performance improvement plans are developed, performance improvement plans are implemented, and performance information is communicated. The performance measurement and management plan should be reviewed at least annually for relevance and be updated as needed.

- 1.M.4.b.(1)**
- 1.M.4.b.(2)**
- 1.M.4.b.(3)**
- 1.M.4.b.(4)**

Although the organization has documented an objective and a performance target, to measure its results achieved for the clients (effectiveness), each program/service seeking accreditation should also document a performance indicator(s), including to whom the indicator(s) will be applied, the person(s)/positions(s) responsible for collecting the data, the source(s) from which the data will be collected, and identification of relevant timeframes for collection of data.



**1.M.5.b.(1)**

**1.M.5.b.(2)**

**1.M.5.b.(3)**

**1.M.5.b.(4)**

Although the organization has documented an objective and a performance target, to measure the experience of services received and other feedback from the clients, each program/service seeking accreditation should also document a performance indicator(s), including to whom the indicator(s) will be applied, the person(s)/positions(s) responsible for collecting the data, the source(s) from which the data will be collected, and identification of relevant timeframes for collection of data.

**1.M.6.b.(1)**

**1.M.6.b.(2)**

**1.M.6.b.(3)**

**1.M.6.b.(4)**

Although the organization has documented an objective and a performance target, to measure the experience of services and other feedback from other stakeholders, each program/service seeking accreditation should also document a performance indicator(s), including to whom the indicator(s) will be applied, the person(s)/position(s) responsible for collecting the data, the source(s) from which data will be collected, and identification of relevant timeframes for collection of data.

**1.M.7.b.(1)**

**1.M.7.b.(2)**

**1.M.7.b.(3)**

**1.M.7.b.(4)**

**1.M.7.b.(5)**

Although the organization has documented an objective, to measure the resources used to achieve results for the clients (efficiency), each program/service seeking accreditation should also document a performance indicator(s), including to whom or what the indicator(s) will be applied, the person(s)/position(s) responsible for collecting the data, the source(s) from which data will be collected, identification of relevant timeframes for collection of data, and a performance target that is based on the organization's performance history or established by the organization or a stakeholder or is based on an industry benchmark.

**1.M.8.b.(1)**

**1.M.8.b.(2)**

**1.M.8.b.(3)**

**1.M.8.b.(4)**

**1.M.8.b.(5)**

Although the organization has documented an objective, to measure service access, each program/service seeking accreditation should also document a performance indicator(s), including to whom or what the indicator(s) will be applied, the person(s)/position(s) responsible for collecting the data, the source(s) from which data will be collected, identification of relevant timeframes for collection of data, and a performance target that is based on the organization's performance history or established by the organization or a stakeholder or is based on an industry benchmark.

**1.M.9.b.(1)**

**1.M.9.b.(2)**

**1.M.9.b.(3)**

**1.M.9.b.(4)**

**1.M.9.b.(5)**

To measure its business function, the organization should also document, for each objective, a performance indicator(s), including to what the indicator(s) will be applied, the person(s)/position(s) responsible for collecting the data, the source(s) from which data will be collected, identification of relevant timeframes for collection of data, and a performance target that is based on the organization's performance history or established by the organization or a stakeholder or is based on an industry benchmark.

**1.M.10.**

Personnel should be provided with documented education and training in accordance with their roles and responsibilities for performance measurement and management.

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

### **Description**

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

### **Key Areas Addressed**

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

## **Recommendations**

**1.N.1.a.**

**1.N.1.b.**

**1.N.1.c.(1)**

**1.N.1.c.(2)**

**1.N.1.c.(3)**

**1.N.1.c.(4)**

**1.N.1.c.(5)**

**1.N.1.d.(1)**

**1.N.1.d.(2)**

**1.N.1.e.(1)**

**1.N.1.e.(2)**

**1.N.1.e.(3)**

**1.N.1.f.(1)**

**1.N.1.f.(2)**

**1.N.1.f.(3)**

**1.N.1.f.(4)**

The analysis of service delivery performance should be documented; be completed at least annually and in accordance with the timeframes outlined in the performance measurement and management plan; address service delivery indicators for each program/service seeking accreditation, including results achieved for the clients (effectiveness), experience of services received and other feedback from the clients, experience of services and other feedback from other stakeholders, resources used to achieve results for the clients (efficiency), and service access; incorporate the characteristics of the clients and impact of extenuating or influencing factors; include comparative analysis, identification of trends, and identification of causes; and be used to identify areas needing performance improvement, develop an action plan(s) to address the improvements needed, implement the action plan(s), and determine whether the actions taken accomplished the intended results.

**1.N.2.a.**

**1.N.2.b.**

**1.N.2.c.**

**1.N.2.d.(1)**

**1.N.2.d.(2)**

**1.N.2.e.(1)**

**1.N.2.e.(2)**

**1.N.2.e.(3)**

**1.N.2.f.(1)**

**1.N.2.f.(2)**

**1.N.2.f.(3)**

**1.N.2.f.(4)**

The analysis of business function performance should be documented; be completed at least annually and in accordance with the timeframes outlined in the performance measurement and management plan; address priority business function indicators determined by the organization; incorporate the characteristics of the clients (if applicable) and impact of extenuating or influencing factors; include comparative analysis, identification of trends, and identification of causes; and be used to identify areas needing performance improvement, develop an action plan(s) to address the improvements needed, implement the action plan(s), and determine whether the actions taken accomplished the intended results.

- 1.N.3.a.
- 1.N.3.b.(1)
- 1.N.3.b.(2)
- 1.N.3.c.

The results of performance analysis should be used to improve the quality of programs and services, facilitate organizational decision making regarding service delivery and business functions, and guide changes to the performance measurement and management plan.

- 1.N.4.a.(1)
- 1.N.4.a.(2)
- 1.N.4.a.(3)
- 1.N.4.b.(1)
- 1.N.4.b.(2)
- 1.N.4.b.(3)

In accordance with the performance measurement and management plan, it is recommended that the organization communicate accurate performance information to clients, personnel, and other stakeholders according to the needs of the specific group, including content, format, and timing.

## 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.

## **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 the person's life. Efforts to include the person served in the direction or delivery of those services/supports are evident.

### **Key Areas Addressed**

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

### **Recommendations**

#### **2.B.5.c.(3)**

Although parents/families are involved in the development of individual program plans, it is not clear if final copies of the plans are shared with clients and their parents/families, as appropriate. A coordinated individualized service plan should be communicated in a manner that is consistently understandable to others, as appropriate. PDSCL may keep a tracking record to show that the individual plan was shared with other stakeholders, such as the parents/family members.

### **Consultation**

- PDSCL has incorporated some concepts of person-centred planning in the individual planning process (i.e., circle of supports). For further improvement in person-centred planning process, the organization can incorporate more person-centred tools and skills in its individual planning process.
- PDSCL sends a survey to all clients who exit programs about two weeks after their exit. It is suggested that the organization conduct a couple of courtesy calls in intervals a few months after discharge to check on the clients who left the programs and offer necessary assistance, if needed.

## **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.

### Consultation

- When developing employment goals for the clients, it is imperative to ensure those goals are individualized. It is suggested that PDSCL develop employment goals based on the clients' needs, strengths, and preferences of each client.

## 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-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**

##### **3.F.1.e.**

Wage payment practices should be provided to the clients.



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

#### **Description**

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

Work is a fundamental part of adult life. Individually tailored job development, training, and support recognize each person's employability and potential contribution to the 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.

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 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

- It is suggested that PDSCL consider using task analysis as a job training tool when, and if, it benefits the clients.

# 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.A. Services for Children and Youth (SCY)

### Description

Services for children and youth include prevention, early intervention, preschool programs, early years programs, after-school programs, outreach, and services coordination. Services/supports may be provided in a variety of settings, such as a family's private home; the organization's facility; and community settings such as parks, recreation areas, preschools, or child day care programs not operated by the organization. In all cases, the physical setting, equipment, and environment meet the identified needs of the children and youth served and their families. Families are the primary decision makers and play a critical role, along with team members, in the process of identifying needs and services.

Early intervention services are structured and coordinated to facilitate the achievement of optimal development through the provision of prevention, assessment, education, development, and/or therapeutic services to infants and toddlers with disabilities or who are at risk of developmental delay and their families. Early intervention focuses on

helping infants and toddlers learn the basic and brand-new skills that typically develop during the first years of life. Broadly speaking, developmental delay means a child is delayed in some area of development. There are five areas in which development may be affected:

- Cognitive development.
- Physical development.
- Communication development.
- Social or emotional development.
- Adaptive development.

Assessment is conducted to determine each child's unique needs and the early intervention services appropriate to address those needs. Families are the primary decision makers in the planning of early intervention services along with personnel relevant to the services being provided. Family-directed services also help family members understand the specific needs of their child and how to enhance the child's development.

Child and adolescent services focus on the development of skills needed by children/adolescents to succeed in school, their family, and their community. An organization may provide an array of distinct services that fall under the heading of child and adolescent services, with different service delivery models that incorporate different practices. Services are individualized to meet the changing needs of the children/adolescents served. Child and adolescent services empower the child/adolescent to develop skills in decision making, including maximizing their participation in the service planning process. Involvement of other team members depends on what the child/adolescent needs and the scope of the services provided. Team members could come from several agencies and may include therapists, child development specialists, social workers, educators, medical professionals, and others.

Some examples of the quality outcomes desired by the different stakeholders of services for children and youth include:

- Services individualized to needs and desired outcomes.
- Collection and use of information regarding development and function as relevant to the scope of the services.
- Children/youth acquiring new skills.
- Collaborative approach involving family members in services.
- Transition planning that supports continuity of services and developmental transitions.
- Increased responsibility of children/youth to make decisions.
- Personal safety of youth in the community.

### **Key Areas Addressed**

- Early intervention
- Individualized services based on identified needs and desired outcomes
- Communication with families and other supports/services
- Collaborative service planning
- Healthcare, safety, emotional, and developmental needs of child/youth
- Skill development for decision making
- Planning for successful transitions

### **Recommendations**

#### **4.A.5.a.**

To facilitate informed decision making, the information gathered should be shared in understandable terms with the child/youth.

- 4.A.12.b.
- 4.A.12.c.
- 4.A.12.f.
- 4.A.12.g.
- 4.A.12.h.
- 4.A.12.i.

The services for children and youth should provide or arrange for educational opportunities for the family to learn about, as desired, aspects of the diagnosis (as appropriate), adjustment to the diagnosis (as appropriate), community resources (including availability of support groups), parenting skills, self-advocacy, and family advocacy.

### **Consultation**

- PDSCL is encouraged to actively collaborate with the education providers. One way to do so is to communicate with education providers on a regular basis, especially when special attention is needed for a particular client. The organization could develop a written communication log that is sent back and forth between teachers at school and service providers at PDSCL. These communication logs might then be delivered by teachers aides that travel with the client.

## **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 the person 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, which are provided under a contract or written agreement with the host family/shared living provider, 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 the individual and identifies applicant host family/shared living providers who are a potential match with the person's identified criteria. The person served makes the final decision of selecting a 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 in the community. The host family/shared living 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 host family/shared living 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 host family/shared living provider encourages and supports the person served to make 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. Although the "home" is generally the host family/shared living 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**

There are no recommendations in this area.

### **Consultation**

- The organization has managed to place clients with the families of their choosing using a variety of methods for many years. It is suggested that the organization create a video presentation to help with the recruiting process. This could include testimonies of families and clients talking about the positive experiences that they are having.

## **4.F. Respite Services (RS)**

### **Description**

Respite services facilitate access to time-limited, temporary relief from the ongoing responsibility of service delivery for the persons served, families, and/or organizations. Respite services may be provided in the home, in the community, or at other sites, as appropriate. An organization providing respite services actively works to ensure the availability of an adequate number of direct service personnel.

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

- Services/supports are responsive to the family's needs.
- Services/supports are safe for persons.
- Services/supports accommodate medical needs.

### **Key Areas Addressed**

- Time-limited, temporary relief from service delivery
- Accommodation for family's living routine and needs of person served

### **Recommendations**

There are no recommendations in this area.

## 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.).

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

- Community participation.
- Increased independence.
- Increased interdependence.
- Greater quality of life.
- Skill development.
- Slowing of decline associated with aging.
- Volunteer placement.
- Movement to employment.
- Centre-based socialization activities during the day that enable persons to remain in their community residence.
- Activity alternatives to avoid or reduce time spent in more restrictive environments, such as hospitalization or nursing home care.

### 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 neighborhoods 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.



## Consultation

- As an enhancement to the organization's efforts to maintain a high level of safety in the homes, it is suggested that the employees be trained on the location of shut offs for water, electric, and gas (as applicable) for each setting they enter. This could be done upon hire and at intervals throughout the year.

## 4.I. Supported Living (SL)

### Description

Supported living addresses the desires, goals, strengths, abilities, needs, health, safety, and life span issues of persons usually living in their own homes (apartments, townhouses, or other residential settings). Supported living services are generally long-term in nature but may change in scope, duration, intensity, or location as the needs and preferences of individuals change over time.

Supported living refers to the support services provided to the person served, not the residence in which these services are provided. A sample of people receiving services/supports in these sites will be visited as part of the interview process. Although the residence will generally be owned, rented, or leased by the person who lives there, the organization may occasionally rent or lease an apartment when the person served is unable to do so. Typically, in this situation the organization would co-sign or in other ways guarantee the lease or rental agreement; however, the person served would be identified as the tenant.

Supported living programs may be referred to as supported living services, independent living, supportive living, semi-independent living, and apartment living; and services/supports may include home health aide and personal care attendant services. Typically there would not be more than two or three persons served living in a residence, no house rules or structure would be applied to the living situation by the organization, and persons served can come and go as they please. Service planning often identifies the number of hours and types of support services provided.

The home or individual apartment of the person served, even when the organization holds the lease or rental agreement on behalf of the person served, is not included in the survey application or identified as a site on the accreditation outcome.

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

- Persons served achieving choice of housing, either rent or ownership.
- Persons served choosing whom they will live with, if anyone.
- Minimizing individual risks.
- Persons served have access to the benefits of community living.
- Persons served have autonomy and independence in making life choices.

### Key Areas Addressed

- Safe, affordable, accessible housing chosen by the individual
- Supports available based on needs and desires
- In-home safety needs
- Living as desired in the community
- Support personnel available based on needs
- Persons have opportunities to access community activities

### Recommendations

There are no recommendations in this area.

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

## **Penticton and District Society for Community Living**

180 Industrial Avenue West  
Penticton BC V2A 6X9  
CANADA

Community Employment Services: Employment Supports  
Community Employment Services: Job Development  
Community Integration  
Host Family/Shared Living Services  
Organizational Employment Services  
Services for Children and Youth: Child and Adolescent Services  
Supported Living

## **Bruce Court**

146 Bruce Court  
Penticton BC V2A 6X9  
CANADA

Community Housing

## **Murray House**

110 Murray Drive  
Penticton BC V2A 7E4  
CANADA

Community Housing  
Respite Services

## **Penticton Retirement Centre**

439 Winnipeg Street  
Penticton BC V2A 6P5  
CANADA

Community Integration  
Organizational Employment Services