

ANNUAL REPORT 2019 - 2020

OUR MISSION

***To Provide Service and Advocacy,
Which Creates Choices and Opportunities,
for Adults with Disabilities to Reach their Maximum Potential***

This is a report on the activities of the organization for fiscal year July 1, 2019 - June 30, 2020

EXCEED, is a California nonprofit organization and maintains a Federal 501(c)(3) tax exempt status.

EXCEED is licensed through State of California Department of Social Services, Community Care Licensing for the Residential Program and the Adult Developmental Centers and certified by the State of California Department of Developmental Services for the Community Programs and by The Department of Rehabilitation for Supported Employment Programs.

The Work Training Center Programs, Situational Assessment Program, Personal, Vocational and Social Adjustment Program and Supported Employment Programs are accredited by Commission on the Accreditation of Rehabilitation Facilities (CARF). EXCEED has been granted a Sub-Minimum Wage certificate for base programs and enclaves by the U.S. Department of Labor and the California Department of Industrial Relations. Business licenses are current at all locations where they are required. Fictitious name filing for dba EXCEED, Casa del Valle, EXCEED Industries, Valley Resource Center and Get Green are current.

The purpose of the organization is to provide advocacy, training and support services primarily to adults with developmental disabilities. These services are individually designed to reflect client choice and promote independence. The purpose is consistent with and reflected in the Articles of Incorporation, Mission Statement and other corporate documents.

There is a membership which meets annually in January. Business presented to the members at the annual meeting included the election of directors, the Annual Report and a question and answer period. Membership is open to all interested persons and applications are available at each facility and on our website at www.weexceed.org.

BOARD OF DIRECTORS 2019-2020



Dr. Richard Giese
Educational
Consultant
President



Rev Quinn Hawley
Military Chaplain
(Retired)
Vice-President



Dorothy McGargill
Broker Associate
Century 21
Secretary



Bruce Ortiz
Owner
King Signs
Treasurer



Myrna Torres
Vice President
Bank of Hemet



Richard Williams
Rehabilitation
Specialist
(Retired)



Tom Wilson
Communications
Director
Abacus Credit
Counseling



Vincent Ponce
Superintendent
Perris Elementary
School District
(Retired)



Michael McIntyre
Owner
Hemet Escrow
Founder



Dennis Murray
Owner
Code 4 Educational
Consulting



Grant Bennett
Superintendent
Perris Union High
School District



David Pyle
Superintendent
San Jacinto Unified
School District



Michael Vargas
Mayor of Perris
Retired LA School
Police Department
Sergeant

Board of Directors

EXCEED has a 9 -16 member volunteer Board of Directors.

While the bylaws make no provisions for the composition of the Board, the current Board represents a variety of community interests and expertise including: financial management, insurance, real estate development, parent/client interest, clergy, business owners, legal issues, community leaders, school facilities development, school administration and rehabilitation specialist.

The Board held meetings 10 times this year (virtual board meetings began in April 2020) and participated in the annual planning retreat, that went virtual in May 2020, to discuss and revise long-term plans.

Management Team

The Board of Directors appoints a CEO to implement policies and manage the day to day operations of the organization. Each year the Management Team holds a planning retreat to review stakeholder input, review progress on objectives, create new objectives for the next fiscal year and develop the annual calendar and budget.

The Management Team consists of the Directors of Training Center Programs, Director of Human Resources, Director of Community Employment Services and Director of Marketing & Resource Development.



Lee Trisler, CEO



Pedro Zambrano
Director of Training
Center Programs
Hemet



Kathy Coake
Director of Training
Center Programs
Perris



Marie Chatman
Director of
Community
Employment
Services



Darlene Noon
Director of
Human
Resources



Sandra Aldridge
Director of
Marketing &
Resource
Development

A MESSAGE FROM LEE TRISLER CHIEF EXECUTIVE OFFICER

Since EXCEED began providing services to adults with disabilities in 1981, it has grown and adapted to the many changes that have taken place in our industry over the past 40 years. From our humble beginnings in a small facility in San Jacinto serving a handful of clients, EXCEED has grown to three program facilities and a residential site which serve approximately 600 program participants each year in 6 different programs.

In our efforts to meet the requirements of the new federal Home & Community Based Services (HCBS) regulations that go into effect in 2022, we have focused our most recent efforts on program development and are pleased to report that our Community Integrated Services Program, launched in May 2019, has been a wonderful success and currently has 150 participants. It brings us great pleasure to witness the personal growth of our program participants as they develop new interests and become involved in their local communities.

Our newest program in development is the Exploration & Enrichment Services program, that will provide a range of activities and training, on-site, as well as in the local community. This latest program began providing services in Hemet in April 2020 and will be established in Perris sometime in 2021.

As we spent the better part of the last 2 years focusing on program development, staff training and lessening the impact of these program changes on our participants and their families, all the preparation in the world could not have prepared us for the biggest change to our lives this year, COVID-19!

The Governor's Stay at Home Order, announced near the end of March due to the COVID-19 Pandemic, has had a huge impact on our personal and professional lives creating changes that we never expected. Everyone, including our clients were mandated to stay home, shelter in place, and only leave home for essential needs. Social distancing, PPE, and mask wearing became our "new normal" and "Zoom" became a household word. In a culture where contact with others is a large part of our emotional well-being, adjusting to this new way of living has been extremely stressful.

Everyone has scrambled for ways to stay "connected" without putting our friends, family and coworkers at risk and EXCEED is no exception. Providing services without being in the same room/facility as our clients has not always been an easy transition but we have had many successes and our program staff continue to find innovative ways to connect and support our clients. From mini-parades, "Chair-Robics", remote assembly projects, paint class and "Pandemic Cooking", creativity in delivering services has become our goal. We learned very quickly how to navigate remote meeting platforms, find funding to pay for technology and PPE and keep everyone safe. One of our major accomplishments was the distribution of 130 tablets to program participants to help them stay connected!

The one thing we learned this year is that our world will never be the same and that we can adapt to whatever the world drops at our feet! So, as the pandemic continues, all of us at EXCEED will continue to meet the needs of our clients, and do whatever it takes, in this "new normal".

Our commitment to our mission will not waver....we will be here for you! Stay safe in our new normal and I wish you all the best until we can be together again.

Lee Trisler, Chief Executive Officer



2019
2020

ADMINISTRATION

Administration

The role of the Administration Department is to provide support for programs, develop resources, procure contracts, develop good public relations, and to promote a positive work environment.

Administrative functions include: Program Evaluation Systems, Facility and Equipment Maintenance, Organizational Records, Special Events, Organizational Systems Maintained, Personnel Management and Payroll, Accounting and Financial Services, Communications, Public Relations, Marketing and Sales, Resource Development, Quality Assurance and Compliance, Fundraising, Clerical Services, Staff Training and Development, Safety Program Training, Technology Planning, Development and Purchasing and Compliance with all state and federal regulations and directives.

Human Resources

168 Employees: Includes full-time, part-time, temporary and as-needed

Staff Retention Rate: 83% over 90 days

Four "Employee of Excellence" celebrations, honoring outstanding employees in each program area

Monthly Wellness Meetings & "The Biggest Loser" Weight loss challenge

49% OF EXCEED
STAFF HAVE BEEN
EMPLOYED
LONGER THAN 5
YEARS!

FIRST AID TRAINED
STAFF
68

CPR TRAINED
STAFF
68

Safety

The Safety Committee (representatives from all program areas and Safety Consultant/Chairman) met 10 times this year. The committee reviewed the Safety Program, and met with client representatives for their input. Facilities were inspected by staff each month and no serious problems were noted. The Adult Developmental Centers and our residential facility were inspected by Community Care Licensing and Inland Regional Center and the transportation vehicles were inspected by CHP and Inland Regional Center, with no major deficiencies noted.

Marketing & Resource Development

At the end of the fiscal year we were members of 5 Chambers of Commerce and attended more than 24 Chamber events in the Inland Empire. We participated in 16 public events and gave 6 tours of our facilities to local dignitaries, businesses and service groups.

We received the following program grants:

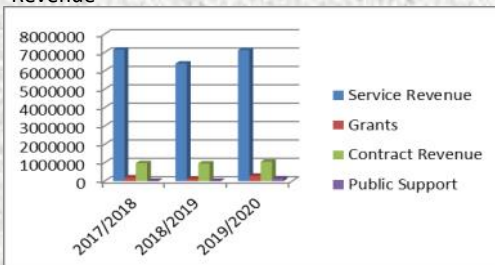
DDS/Inland Regional Center, \$200,181.09; Riverside County Transportation Commission Measure A, \$60,000; Milgard Windows, \$15,000; Edison International, \$11,250; Riverside County Third District Supervisor, \$2,500.

Public support remained strong with very generous gifts from the following:

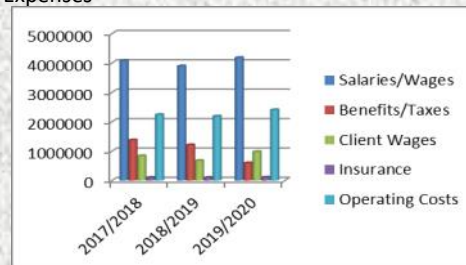
Mr. Dennis Murray; The Bank of Hemet; The Knights of Columbus Hemet Council; The Knights of Columbus Perris Council; Mrs. Arn Lahde; Dr. Richard Giese; Vince & Eileen Ponce; Mr. & Mrs. Steven Rapp; Bridges to Help; Mike McIntyre; Seven Hills Women's Club; Mr. & Mrs. Mark McGargill; Evans-Brown Mortuary; Mr. & Mrs. Steven Boe; Mr. Tom Wilson; Mr. John Dietrich

FINANCIALS (UNAUDITED)

Revenue



Expenses



Revenue	Year 17/18	Year 18/19	Year 19/20	Expenses	Year 17/18	Year 18/19	Year 19/20
Service	\$7,152,868	\$6,395,399	\$7,127,402	Salaries/Wages	\$4,080,366	\$3,896,185	\$4,179,296
Grants	\$199,625	\$123,980	\$288,931	Client Wages	\$840,736	\$677,044	\$597,562
Contracts	\$980,774	\$957,012	\$1,055,895	Benefits/Taxes	\$1,377,939	\$1,211,464	\$978,160
Public Support	\$17,992	\$16,748	\$1,511,78	Insurance	\$103,830	\$103,464	\$110,137
				Operating Costs	\$2,240,792	\$2,188,324	\$2,405,665

2019
2020

COMMUNITY INTEGRATED SERVICES

Community Integrated Services

The purpose of EXCEED's CIS is to provide person centered services that provide individualized supports to assist individuals to live quality lives as productive and active members of their communities.

The program focus is participation in meaningful community integrated activities and volunteer opportunities that assist individuals to evaluate their vocational skills and abilities and then develop specific work skills, abilities and interests that may lead to community integrated employment (CIE), additionally these volunteer activities provide an avenue for individuals to contribute their unique gifts and talents to the local community.

EXCEED's CIS Program is designed to assist individuals to transition from the WTC's and ADC's into community membership and eventually, Community Integrated Employment when possible. Support will be provided to utilize natural/generic resources in each individual's community.



150

PROGRAM PARTICIPANTS

THANK YOU TO OUR PROGRAM PARTNERS!

- * American Legion Post 53 * Boys & Girls Club of Menifee * Boys & Girls Club of Perris * Fingerprints Youth Museum *
- * Help Heal Veterans * Historic Hemet Theatre * March Field Air Museum * Marion V. Ashley Community Center
- * Moreno Valley Senior Community Center * "Perris Green" City Farm * Perris Senior Center
- * Riverside County Animal Shelter * The Shella Foundation * * The Simpson Center * T.H.E. Center
- * Wee Care Children's Learning Center *



2019
2020

WORK TRAINING CENTERS

Work Training Centers

The Work Training Centers in Hemet and Perris provide a remunerable work experience for adults with developmental disabilities that wish to develop and maintain vocational, social and behavior skills. Pre-Employment skills training, interpersonal relationships, attendance & punctuality, work safety, work tolerance and specific job skills training are critical components of the program to prepare clients for work in the most integrated setting possible.



248 CLIENTS ACHIEVED ONE OR MORE OF THEIR GOALS

308 CLIENTS
SERVED AT THE
HEMET & PERRIS LOCATIONS

11 CLIENTS TRANSITIONED TO
COMMUNITY EMPLOYMENT
SERVICES (SE)



THANK YOU TO OUR CONTRACT PARTNERS!

All Source	AKA Products
American Alliance Corp	Assemblies Unlimited
Berlin Packaging	Boxout
Britevision	Cognitive Square Inc.
Contract Labeling Services	Eastern Municipal Water District
Epic Packaging	Family Foods International Inc.
GoDonut	Help Heal Veterans
Hemet Escrow	iHerb
Integrity Design Group	Jassu Ltd.
Liberty Electronics	MGA Entertainment
Microdyn Plastics	Milgard Windows
Ouai Fze	Prestige Packaging
PRG	Rens Enterprise Inc.
Slide-A-Shelf	Strech Plastics
The Medicine Shoppe	Wessco International
West Coast Labels	WBC Group

2019
2020

ADULT DEVELOPMENTAL CENTERS

Adult Developmental Centers

The Adult Developmental Centers in Perris and Hemet provide basic living skills training, which assists clients in reaching their maximum level of independence, along with access and inclusion in the community. Our curriculum includes self-advocacy, mobility, money management, functional reading, basic academics, pre-work skills, writing, daily living skills and personal growth and development.

95 CLIENTS SERVED AT THE PERRIS & HEMET FACILITIES



24,028 HOURS
IN COMMUNITY ACTIVITIES



82% OF CLIENTS ACHIEVED ONE OR MORE OF
THEIR GOALS!



CLIENT SATISFACTION WITH SERVICES REMAINS
HIGH AT "VERY GOOD" OR BETTER!

LICENSED BY THE STATE OF CALIFORNIA, DEPT OF SOCIAL SERVICES
COMMUNITY CARE LICENSING

2019
2020

COMMUNITY EMPLOYMENT SERVICES

Supported Employment

Provides individual training and a combination of support services in community-based employment. This program enables clients to work independently, achieve and maintain employment in an integrated setting in the business community. Individual Placements (IP's), receive initial support services from an EXCEED Vocational Trainer in areas such as orientation, employer policies, job duties and safety procedures. Clients receive on-going support as needed in order to maintain or enhance employment.

Group Placements receive continuous support from an EXCEED on-site supervisor.

External Situational Assessment

Provides an evaluation of a clients functional capacity for community based employment, identifying strengths , barriers and possible on-the-job supports necessary for the client to be successful.



AVERAGE LENGTH OF
EMPLOYMENT
8 YEARS



160 CLIENTS WORKING IN
COMPETITIVE INTEGRATED
EMPLOYMENT! (CIE)



AVERAGE "INDIVIDUAL
PLACEMENT" (IP) WAGE
\$16.00

THANK YOU TO OUR EMPLOYER PARTNERS!

* At Home * AutoZone * Clayton Homes - Perris * Del Taco * EM Logistics * Eye Care Center of Hemet * Food 4 Less *
* Grocery Outlet * Golden West * HBX * Hemet Unified School District * Home Depot * HomeGoods * Hometown Buffet
* Jenson USA * La Perla Market * Lowe's Regional DC * Old Navy * Panera Bread * Petco * Petsmart *
* Perris Union High School District * Raising Cane * Ralphs * Salvation Army Corps Office, Hemet * Shakey's Pizza
* Smart & Final * Soboba Casino * Sonic Burger * Southwest Riverside County Association of Realtors * Taco Bell * Target *
* Tech Data * TJ Maxx * Walgreens * Walgreens Regional DC * Walmart * Wayfair * Vons *

184 SITUATIONAL
ASSESSMENTS
COMPLETED



CARF ACCREDITED SINCE 1987

24 CLIENTS PARTICIPATED IN
THE PAID INTERNSHIP
PROGRAM



2019
2020

CASA DEL VALLE

Casa del Valle

The Casa del Valle Residential Program provides long-term housing, care and training to adults with developmental disabilities in a 4,400 square foot, 14 bed facility on approximately 0.9 acres. Casa residents enjoy a safe and healthful living environment where they can learn skills to enhance their independence and participate in the normalized living and working patterns of their community.

EXCEED provides homelike residential service and supports that enable each resident to reach their maximum level of independence and integration and enjoy a quality of life based on dignity and respect.

Casa del Valle shifted to "essential only" trips outside of the facility and no visitor policy at the end of March 2020 due to the COVID-19 pandemic.

4253 HOURS SPENT IN COMMUNITY ACTIVITIES!



LICENSED BY THE STATE OF CALIFORNIA, DEPT OF
SOCIAL SERVICES, COMMUNITY CARE LICENSING



CASA DEL VALLE IS "HOME" TO 14 RESIDENTS

Major Accomplishments

- We participated in the CDSA Annual Recognition Dinner and Legislative Breakfast. We met with 2 members of the legislature to discuss our industry.
- We attended more than 24 Chamber of Commerce events throughout the Inland Empire
- There were 160 clients in job placements in the community
- The average wage for IP increased to \$16.00, last year it was \$13.52
- Client, parent/care provider satisfaction remains high
- An average of 53% clients in the Work Training Centers increased their production rate each quarter and 248 clients achieved one or more of their goals
- Our buildings are accessible and kept in good repair despite being over 20 years old
- The results of our outside inspections by funders and regulatory agencies are consistently very good
- 24,028 client hours of service, in the ADC programs, were provided in the community
- The Workshops exceeded their budget for production work
- We launched the new Exploration & Enrichment Services Program in Hemet
- Our revenue exceeded expenses by \$352,000

Challenges and Expectations Not Met

- We had a major re-structure of our services due to COVID-19
- Staff retention rate was lower than our goal primarily because we are unable to provide competitive wages
- Several of our service goals fell short due to the impact of COVID-19 during the last 4 months of the fiscal year

What We Want to Accomplish Next Year

- Continue to inform legislators of the value of our services to the community
- Increase the number of program participants in Supported Employment placements and client service hours in the community/integrated work settings (ADC / CIS / E&E)
- Increase our revenue and increase the staff and client wages
- Have satisfied clients, parents/care providers, funders, employers and customers
- Revenue to exceed expenses at year end
- Develop at least 1 new service program
- Relocate the Perris programs to more appropriate sites due to changes in services
- Complete our CARF Accreditation Survey



EXCEED

OUR VISION

An environment where each client is valued as an individual and is provided the opportunity to reach his/her maximum potential.

OUR MISSION

To provide service and advocacy, which creates choices and opportunities, for adults with disabilities to reach their maximum potential.

VALUE STATEMENT

As a nonprofit service organization, above all else, we value:

- *Respect for all people*
- *Creating opportunities and choices*
 - *Quality environment*
 - *Self-directedness*
 - *The future.*

CODE OF ETHICS

We, the Directors and Employees of EXCEED, are united in the support of the organization's Mission Statement, and therefore, establish and commit to abide by this Code of Ethics:

- *We will conduct ourselves as professionals in our industry, by acting in good faith, maintaining the highest standards of integrity, dedication and open-mindedness.*
- *We recognize the worth of all individuals and will, therefore, treat them with thoughtful consideration and respect at all times.*
- *We will promote opportunities for the advancement and success of those we serve.*
- *We will continually strive to better our industry and community through partnership, teamwork and cooperation.*