



# ANNUAL REPORT 2020 - 2021





## **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, 2020 - June 30, 2021

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](http://www.weexceed.org).

## BOARD OF DIRECTORS 2020-2021



**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)



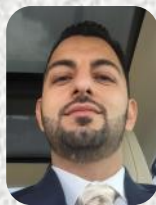
**Tom Wilson**  
Communications  
Director  
Abacus Credit  
Counseling



**Vincent Ponce**  
Superintendent  
Perris Elementary  
School District  
(Retired)



**Michael McIntyre**  
Owner  
Hemet Escrow  
**Founder**



**Shade Awad**  
Business Developer  
Entrepreneur



**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 12 -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, 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

As we begin this new fiscal year, I want to take a moment to reflect on this past year of significant transition and the effects of COVID-19 on all our lives and EXCEED services.

In our efforts to meet the requirements of the federal Home & Community Based Services (HCBS) regulations, we completed our transition from Work Training Center services to community-based services. While many believe that the Work Training Center is an important service option, circumstances lead EXCEED to make this program change.

For more information on the HCBS rule, visit <https://www.dds.ca.gov/initiatives/hcbs/>

For the past 2 years we have been focused on new program development to prepare for the eventual closure of the workshop programs. Our transition plan was inadvertently accelerated due to the sale of our program site in April 2021. This initiated the relocation of our Community Integrated Services Program to new Murrieta and Riverside locations, and the establishment of the Exploration & Enrichment Services Program in Perris. Our Adult Developmental Center and Sack's Thrift Avenue store will remain at the Trumble Rd. site until early 2022.

It is only with the hard work, diligence and support of the dedicated staff at EXCEED, that we were able to make eight moves in a 10 week timeframe.

In addition to establishing new program services, we were challenged with developing new methods to engage with the persons we serve. Our staff adapted and embraced new service models to continue providing engagement, training and support.

A couple of years ago terms like pandemic, social distancing and PPE were not part of everyday conversation. Everyone has been touched in some way by loss, lockdowns, restrictions and the complete rearrangement of our everyday lives.

From these challenges we have all discovered how innovative and resilient we can be! Many program participants learned how to use technology and remote meeting platforms to connect with their EXCEED support team and peers. Our staff have been so creative in their efforts to provide engaging training and supports for program participants and their families. Together we found ways to safely host events such as our "Drive Thru" Spring Fling and virtual Dance Parties. Our mobile "Parades" to honor our program participants and their families were a huge success, and enjoyed by everyone that participated. Our resourceful staff delivered activity kits, organized virtual tours of the world, creative writing classes, numerous cooking classes, painting classes and other innovative ways to engage and serve our clients in positive ways!

In the coming year we will focus on the expansion of community-based services, recruiting and training more direct service professionals and returning to more in-person services. Given all that has happened over the past 2 years and the exceptional response from staff, persons we serve and their families and the members of the Board Directors, I'm sure we'll be successful.

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





**2020  
2021**

# ADMINISTRATION

## Administration

The role of the Administration Department is to provide support for programs, develop resources, 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, 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

166 Employees: Includes full-time, part-time, temporary and as-needed  
Staff Retention Rate: 72% over 90 days

## Safety

The Safety Committee (Representatives from all program areas and Safety Chairman) met virtually 6 times this year. The committee reviewed the Safety Program and facilities were inspected by staff each month with no serious problems noted. Annual inspections by Community Care Licensing and Inland Regional Center were not completed this year due to the COVID-19 pandemic. The CHP inspection at Perris and Santa Fe were completed with no major deficiencies noted.

**52% OF EXCEED  
STAFF HAVE BEEN  
EMPLOYED  
LONGER THAN 5  
YEARS!**

## Marketing & Resource Development

All in-person events were cancelled for the 2020-2021 year, although we did attend several virtual events.

For the 2020-2021 year, we received the following grants:

DDS/Inland Regional Center, \$37,892; Riverside County Transportation Commission Measure A, \$56,508; City of Hemet, Community Development Block Grant, \$54,472; Edison International, \$3750; Non-Profit's United, \$750, CARES Act Provider Relief Fund, \$149,493, Federal PPP, \$1,000,958

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

Aaron's Inc., The Bank of Hemet; Dr. Richard Giese; Vince & Eileen Ponce; Mr. & Mrs. Mark McGargill; Mr. Tom Wilson; Mr. John Dietrich; Mr. & Mrs. Peter Harrison; Milgard Manufacturing; Prestige Packaging & Display; Ozola; Integrity Design Group;

**Six new transportation vehicles were received (4 buses/2 vans) from the CalTrans/FTA 5310 Grant, Enhanced Mobility for Seniors and Individuals with Disabilities Program!**



## FINANCIALS (UNAUDITED)

Revenue	Year 18/19	Year 19/20	Year 19/20	Expenses	Year 18/19	Year 19/20	Year 20/21
Service	\$6,395,399	\$7,127,402	\$7,406,602	Salaries/Wages	\$3,896,185	\$4,179,296	\$4,564,403
Grants	\$ 123,980	\$ 288,931	\$1,266,043	Client Wages	\$ 677,044	\$ 597,562	\$ 389,862
Contracts	\$ 957,012	\$1,055,895	\$1,232,854	Benefits/Taxes	\$1,211,464	\$ 978,160	\$1,183,236
Public Support	\$ 16,748	\$ 13,853	\$ 8,066	Insurance	\$ 103,464	\$ 110,137	\$ 96,085
				Operating Costs	\$2,188,324	\$2,405,665	\$2,228,877

2020  
2021

# 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 the natural resources in each individual's community.



130  
PROGRAM PARTICIPANTS

## THE IMPACT OF COVID-19

As we transitioned to "Alternative Services", we found new and exciting ways to keep our program participants engaged! "Pandemic Cooking" became a favorite with our clients learning many new skills in the kitchen! We provided opportunities for participation in remote exercise, employment readiness training,, art class, virtual birthday parties and many more activities. Program participants continued to work on their goals and stay connected to their EXCEED support team!





2020  
2021

# EXPLORATION & ENRICHMENT SERVICES

## Work Training Centers

In March 2021, we closed the Work Training Center Programs in Hemet and Perris to comply with the Federal Home & Community-Based Services (HCBS) Rule.

The rule states that the setting for providing services must be integrated in, and supports full access of individuals receiving services to the greater community, including opportunities to seek employment and work in competitive integrated settings, engage in community life, control personal resources, and receive services in the community, to the same degree of access as individuals not receiving Medicaid HCBS.

ALL CLIENTS FROM THE WORK TRAINING CENTERS  
TRANSITIONED TO THE PROGRAM OF THEIR CHOICE

## Exploration & Enrichment Services

Our newest program, Exploration & Enrichment Services, welcomed new program participants in April 2020 at the Hemet Program Facility.

The program purpose is to provide person-centered services that provide activities and training in daily living skills, basic academics, personal hygiene, grooming, recreation, maintenance of positive behaviors, safety practices, functional skills development and community access and inclusion.

This program allows for services to be provided in the classroom as well as in the community.



## THE IMPACT OF COVID-19

Because of the "Stay-at-Home order issued in March 2020, all program services for the Exploration & Enrichment Services Program have been remote. Clients were issued EXCEED tablets and email addresses which enabled us to provide Zoom classes and connect via email and Google Duo. EXCEED provide all the items needed for cooking and arts & craft classes and everyone did their best to adjust to this new way of providing and receiving services!



31

PROGRAM PARTICIPANTS

2020  
2021

# 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.

90 CLIENTS SERVED IN THE PERRIS & HEMET PROGRAMS



86% OF CLIENTS ACHIEVED ONE OR MORE OF THEIR GOALS!



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

## THE IMPACT OF COVID-19

The Adult Developmental Center provided remote services for the entire fiscal year due to requirements from Community Care Licensing. Staff continued to work on goals with all of our clients, delivered supplies for cooking classes, taught COVID-19 safety and celebrated special client milestones! Clients were able to request tablets to enable them to stay connected and participate in services.





2020  
2021

# 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.

## Vocational Assessment

Provides and evaluation of the clients desires, strengths, weaknesses, ability and realistic feasibility in achieving a specific vocational goal.



CARF ACCREDITED SINCE 1987

AVERAGE  
TENURE  
8.1 YEARS  
NATIONAL  
AVERAGE  
4.3 YRS

AVERAGE  
"INDIVIDUAL  
PLACEMENT"  
(IP)  
WAGE  
\$16.25



THANK YOU TO OUR EMPLOYER PARTNERS!

\* Amazon \* At Home \* AutoZone \* Clayton Homes - Perris \* Del Taco \* Food 4 Less \*  
\* Hemet Unified School District \* Home Depot \* HomeGoods \* Jenson USA \* Lowes Regional DC \* March Air Reserve Base \*  
\* Perris Union High School District \* Penn Emblem \* Petco \* Phoenix Tech Inc. \* Ralphs \* Soboba Country Club \*  
\* Smart & Final \* Sonic Burger \* Southwest Riverside County Association of Realtors \* Target \* Tech Data \* TJ Maxx \*  
\* Vons \* Walgreens \* Walgreens Regional DC \* Walmart \*

104 CLIENTS REFERRED FOR  
SITUATIONAL ASSESSMENTS

162 CLIENTS SERVED IN  
SUPPORTED EMPLOYMENT

20 CLIENTS REFERRED FOR  
VOCATIONAL ASSESSMENTS



2020  
2021

# 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.

CASA DEL  
VALLE IS  
"HOME"  
TO 11  
RESIDENTS



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



All of us at EXCEED  
and our Casa del  
Valle residents,  
send out a huge  
THANK YOU to  
Lowe's Heroes for  
once again  
blessing our  
residential facility  
with a few new  
appliances and  
outdoor supplies  
in November 2020!

## THE IMPACT OF COVID-19

Casa del Valle continued under COVID-19 lockdown for the 2020-2021 fiscal year.

Trips into the community continued to be for essential needs only and clients did not participate in any recreational outings. All staff and clients were required to be vaccinated to help control the spread COVID-19.



## **Major Accomplishments**

- \* Implemented the new Exploration & Enrichment Services Program in Perris.
- \* Acquired five new sites to relocate and expand current programs.
- \* Transferred all Work Training Center Program clients into community-based programs and services.
- \* Maintained our group contracts with Lowes RDC, Tech Data, March AFB, Clayton Perris, and other businesses that provide employment to our clients, through the pandemic and lockdowns.
- \* Became skilled at providing creative and engaging alternative services. Clients and their families regularly shared their thanks and compliments to EXCEED staff for all their efforts.
- \* We distributed 200 tablets to clients and instructed them on their use. Clients were issued their own EXCEED email address to enable easy access to services and contact with their EXCEED support team and peers.
- \* Organized virtual Spring Fling and Harvest Festival events for all clients.
- \* Established a series of "Virtual Update on Services" meetings for clients, care providers and families.
- \* Arranged for two staff to become Certified "Person-Centered Planning" trainers.
- \* Transitioned our Work Training Center facility to "EXCEED Industries".
- \* Developed 21 new job sites and placed 54 clients in employment placements.
- \* Restructured our services to be more in compliance with the Home & Community Based Services (HCBS) federal mandates.

## **Challenges and Expectations Not Met**

- \* Most of our unmet expectations (Objectives) were regarding community activities and participation. Due to lockdowns and restrictions there was little or no opportunity to access community venues.
- \* It was extremely challenging to find new sites for our Exploration & Enrichment and Community Integrated Services Programs and to consolidate the Perris and Hemet workshops into one EXCEED Industries site located in Hemet.
- \* It has become very difficult to recruit and retain staff due to COVID-19 related manpower shortages.
- \* Keeping up with ever-changing COVID-19 requirements and/or guidelines at the County, State and Federal level has been challenging.
- \* The COVID-19 pandemic forced many changes in policies and procedures in our industry, which was exceptionally problematic.

## **What We Want to Accomplish Next Year**

- \* Provide more in-person services and device training for clients and their support team.
- \* Develop at least 15 new volunteer sites for client work experience and training.
- \* Increase EXCEED Industries Revenue (Production Plant, Thrift Store and Document Shredding) and open an additional thrift store.
- \* Relocate the Trumble Rd. ADC and Thrift Store.
- \* Launch the Exploration & Enrichment Services Programs in Murrieta and Mission Grove areas.
- \* Expand online training opportunities for EXCEED staff.
- \* Successfully complete our CARF Accreditation Survey.
- \* Plan a 40th anniversary celebration.



# 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.*