

ANNUAL REPORT 2021-2022



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, 2021 - June 30, 2022
EXCEED, is a California nonprofit organization and maintains a Federal 501(c)(3) tax exempt status.

EXCEED is also licensed through the 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 Exploration & Enrichment Services, Community Integrated Services, and Supported Employment Programs and by The Department of Rehabilitation for our Community Employment Services Programs.

The 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 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 Corporation officially changed it's legal name to Valley Resource Center Inc., this year.

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 participant choice and promote independence.

This 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 2021-2022



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)



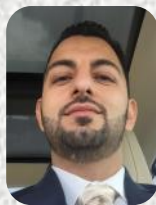
Tom Wilson
Communications
Director
Abacus Credit
Counseling



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/participant interest, clergy, business owners, legal issues, community leaders, school facilities development, school administration and rehabilitation specialist.

The Board held meetings 10 times this year, a combination of virtual and in-person meetings, and participated in the annual planning retreat 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 Director of Licensed Programs, the Director of Community Employment Services and the Director of Marketing & Resource Development.

**A MESSAGE FROM LEE TRISLER
CHIEF EXECUTIVE OFFICER**

It has been another busy year filled with changes and challenges!

As the COVID-19 Pandemic became less of a health threat, we turned to the task of preparing for “back to normal”. We soon realized that the normal was not going to look like it did before COVID-19.

The challenge of providing on-site, in-person, and community-based services and keeping everyone safe and healthy became our priority.

As we started the journey back to traditional services, we found many of the resources we had a couple of years ago were no longer available or had changed.

Many of the transportation services our program participants relied on, were now closed or significantly reduced which resulted in new challenges helping participants get to their program or job.

Our day programs had many participants who did not want to return to full-time traditional services due to health concerns or their preference for remote services. The Department of Developmental Services is considering the possibility of including remote services as part of traditional services, at least temporarily.

The one positive element as a result of the ever-changing conditions and challenges of the pandemic has been our ability to adapt, and willingness to do things differently. Because of some of the solutions we created and changes we made, we learned how creative and resilient we can be! During the past two years we were focused on discovering additional methods to provide quality services, which resulted in our increased openness to change and new possibilities.

We will take what we have learned into the future, with new and exciting opportunities for our program participants.

Although the service system is still recovering from staff shortages, rising costs and fewer resources, I have confidence that together, “We Can Do It”!



Lee Trisler, Chief Executive Officer

**2021
2022**

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 organizational compliance with all state and federal regulations and directives.

Human Resources

196 Employees: Includes full-time, part-time, temporary and as-needed
Staff Retention Rate: 49% over 90 days

AVERAGE
STAFF TENURE
6.8 YRS

Safety

The Safety Committee (Representatives from all program areas and Safety Chairperson) met virtually 6 times this year. The committee reviewed the Safety Program and all facilities and vehicles were inspected each month with noted repairs fixed in a timely manner.

There were no major safety violations or serious vehicle incidents this year. Annual inspections by Community Care Licensing and Inland Regional Center were not completed this year due to the COVID-19 pandemic. Our CHP terminal inspections resulted in no problems cited.

Marketing & Resource Development

We attended 42 events this year which was a combination of virtual and in-person events at Riverside, Hemet/San Jacinto, Menifee and Perris Valley Chambers of Commerce, along with California Disability Services Association and Inland Regional Center events.

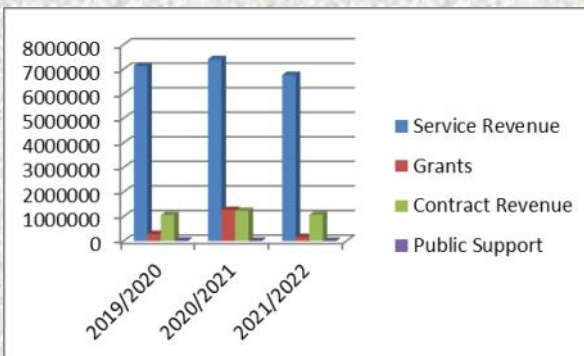
For the 2021-2022 year, we received the following grants:

Riverside County Transportation Commission Measure A, \$90,885;
City of Hemet, Community Development Block Grant (Access to Technology) \$21,934
City of Hemet, Community Development Block Grant (Art in the Park) \$17,549
Edison International, \$1250; Non-Profit's United, \$750

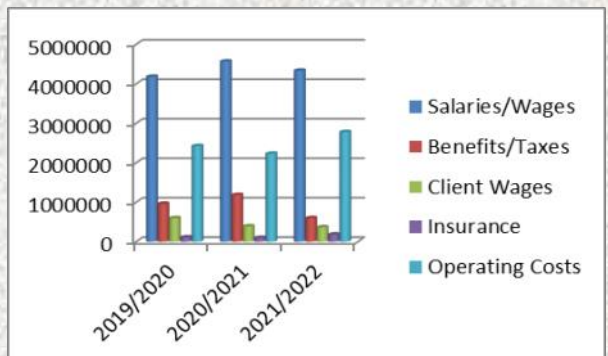
Public support remained strong with very generous gifts from the following:
Aaron's Inc., The Bank of Hemet; Dr. Richard Giese; Mr. & Mrs. Vince Ponce; Mr. & Mrs. Mark McGargill;
Mr. & Mrs. Tom Wilson; Mr. John Dietrich.

FINANCIALS

Revenue



Expenses



**2021
2022**

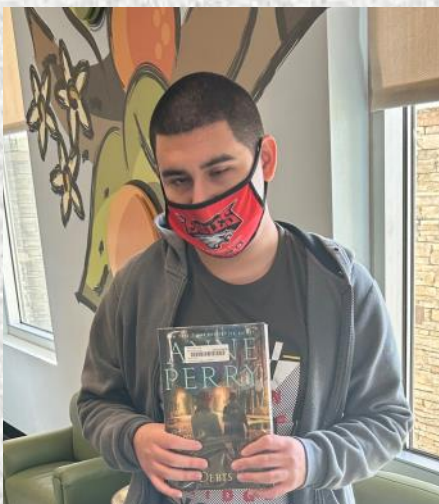
COMMUNITY INTEGRATED SERVICES

Community Integrated Services

The purpose of EXCEED's Community Integrated Services program 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 Competitive Integrated Employment (CIE). Additionally these volunteer activities provide an avenue for individuals to contribute their unique gifts and talents to their local communities.

EXCEED's CIS Program is designed to assist individuals to transition into community membership, and eventually, Competitive Integrated Employment when possible. Support is provided utilizing the natural resources in each individual's community.



75% OF PARTICIPANTS RECEIVED TABLETS TO HELP THEM ACCESS PROGRAM SERVICES AND ACTIVITIES REMOTELY

THE IMPACT OF COVID-19

Partway through the year, we began a slow return to in-person services and our program participants were offered remote, in-person, or a combination of both services of their choosing. The program continued to offer opportunities for personal growth and community exploration throughout Temecula, Murrieta, Menifee, Perris, Moreno Valley, Riverside, and Hemet./San Jacinto.



**126
PROGRAM
PARTICIPANTS**



**2021
2022**

EXPLORATION & ENRICHMENT SERVICES

Exploration & Enrichment Services

The Exploration & Enrichment Services Program provides person-centered 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 program center, as well as in the community.

This program offers services in Hemet and Perris.



**120 PROGRAM
PARTICIPANTS**



THE IMPACT OF COVID-19

Participants continued to receive remote services until it was safe enough to implement a slow return to in-person services. We continued to provide all the items participants needed to engage in our remote cooking and arts & crafts activities and participants continued to receive individualized services based on their goals. When it was time to return to in-person services, we provided as many outdoor activities as possible to reduce the risk of COVID-19 transmission.



**WE PROVIDED 71 TABLETS TO PARTICIPANTS TO HELP THEM
ACCESS PROGRAM SERVICES AND ACTIVITIES REMOTELY**

**95% OF PARTICIPANTS ACHIEVED ONE OR
MORE OF THEIR GOALS**



**2021
2022**

ADULT DEVELOPMENTAL CENTERS

Adult Developmental Centers

The Adult Developmental Centers in Perris and Hemet provide basic living skills training, which provides assistance to program participants 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.

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



**95% OF
PARTICIPANTS
ACHIEVED ONE
OR MORE OF
THEIR GOALS!**

86 PARTICIPANTS SERVED IN THE PERRIS & HEMET PROGRAMS

THE IMPACT OF COVID-19

The Adult Developmental Center provided remote services for part of the year and began a slow return to in-person services. For those participants that chose remote services, we continued to deliver supplies for cooking classes, teach COVID-19 safety, and celebrated special participant milestones! To help reduce the transmission of COVID-19, we focused on safe, outdoor activities for our in-person participants, which included our Art in the Park program in Hemet! Our access to technology project continued to provide tablets with internet service for participants who elected to receive remote services.



2021
2022

COMMUNITY EMPLOYMENT SERVICES

Supported Employment

Provides individual training and a combination of support services in community-based employment. This program enables participants 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. Participants receive on-going support, as needed, in order to maintain employment. Group Placements receive continuous support from an EXCEED on-site supervisor.

External Situational Assessment

Provides an evaluation of a participants viability for community based employment, identifying strengths , barriers and possible on-the-job supports necessary for the participant to be successful.

Vocational Assessment

Provides an evaluation of the participants desires, strengths, abilities, and realistic feasibility of achieving their specific vocational goal.

Adult Work Experience

Provides program participants an opportunity to explore competitive integrated work experiences in a variety of real-time work settings, to develop and/or enhance work skills, and orientation to work environments.



CARF ACCREDITED SINCE 1987

AVERAGE
"INDIVIDUAL
PLACEMENT"
(IP)
WAGE
\$17.24

AVERAGE
TENURE
8.0 YEARS
NATIONAL
AVERAGE
4.3 YRS



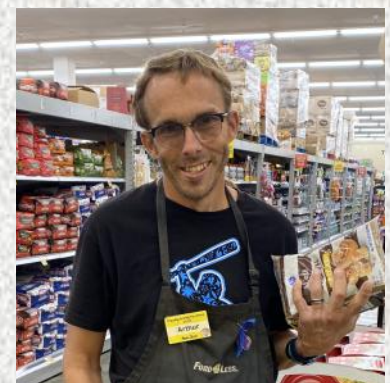
THANK YOU TO OUR EMPLOYER PARTNERS!

* Amazon * At Home * AutoZone * Clayton Homes - Perris * Del Taco * Food 4 Less *
* Hemet Unified School District * Home Depot * HomeGoods * Jensen USA * Lowes Regional DC * March Air Reserve Base *
* Penn Emblem * Petco * Phenix Tech Inc. * Ralphs * Soboba Country Club * * Smart & Final * Sonic Burger * Target *
* TJ Maxx * Vons * Walgreens Regional DC * Walmart *

73 PARTICIPANTS REFERRED FOR
SITUATIONAL ASSESSMENTS

158 PARTICIPANTS SERVED IN
SUPPORTED EMPLOYMENT

16 PARTICIPANTS REFERRED FOR
VOCATIONAL ASSESSMENTS



2021
2022

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 healthy 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 IS
"HOME"
TO 12
RESIDENTS

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



THE IMPACT OF COVID-19

Although there were minor COVID-19 outbreaks throughout the year, our staff and residents remained overall healthy. To minimize the transmission of COVID-19, the residents were limited in the number of community outings they were able to participate in for safety reasons, but most attended the Hemet Art in the Park sessions. Many residents returned to their programs on a part-time basis, mid-year, and also received outdoor program services at the residence.

Major Accomplishments

- Successfully completed CARF survey and received a 3 year accreditation.
- Maintained our group contracts with Lowes RDC, Tech Data, March AFB, Clayton Perris, and other businesses that provide employment to our participants, through the pandemic and lockdowns.
- Became skilled at providing creative and engaging alternative services. Participants and their families regularly shared their thanks and compliments to EXCEED staff for all their efforts.
- We continued to distribute tablets to participants and instructed them on their use. Participants were issued their own EXCEED email address to enable easy access to services and contact with their EXCEED support team and peers.
- Organized in-person Spring Fling and Harvest Festival events for all participants.
- Provided "Virtual Update on Services" meetings for participants, care providers and families.
- Transitioned 15% of day program participants to in-person services by end of the fiscal year.
- Developed 15 new job sites and placed 37 participants 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 lock downs and restrictions there was little or no opportunity to access community venues.
- It has become very difficult to recruit and retain staff due to COVID-19 related manpower shortages and inability to pay competitive wages.
- Regional Centers' delay in providing authorizations and appropriate funding has resulted in an unanticipated decrease in service revenue.
- 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

- Return to traditional services with the addition of a remote services option.
- Develop at least 8 new volunteer sites for participant work experience and training.
- Increase EXCEED Industries Revenue (Production Plant, Thrift Store and Document Shredding) and add a new Janitorial Service.
- Continue to advocate for service rate increases with Inland Regional Center and DDS.
- Expand training opportunities for EXCEED staff.
- Have at least 80% of direct service staff positions filled by year-end.
- Successfully apply for and receive ERC funding.



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.*