



ANNUAL REPORT

2022/2023



1285 North Santa Fe St., Hemet, CA 92543



<https://weexceed.org>

ANNUAL REPORT 2022-2023

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, 2022 - June 30, 2023

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 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., last 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 available to all staff and clients of EXCEED.



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.



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
HCN Bank



Richard Williams
Rehabilitation
Specialist
(Retired)



**Kathy
Bloom-Rudibaugh**
Attorney



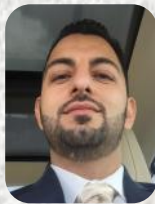
Tom Wilson
Communications
Director
Abacus Credit
Counseling



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

Management Team

The Board of Directors appoints a CEO to implement policies and manage the day to day operations of the organization with a Management Team.

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.



MESSAGE FROM LEE TRISLER, CEO



During the past year, we saw many successes and accomplishments. Even though there were many obstacles, including staff shortages and underfunded programs, the people we serve continue to grow and reach their goals.

One of our major successes has been the development of the Art in the Park project, which began during the pandemic. The art sessions provided a way for clients to develop their creativity, collaborate on projects with their peers, and foster a sense of pride in their accomplishments.

The culmination of this project was a very successful public art show that allowed the community to share in the special works and talents of our clients. One of the notable outcomes from the art sessions has been the growth of our clients. As they became more confident, clients who had difficulty interacting began to engage with others as they shared their art work and were excited to explain their “artistic process and unique creations” to others.

In addition to the art show, the City of Hemet featured displays of the clients work at several of their public buildings.

It is a tribute to our hard-working, dedicated staff that clients met their goals and their level of satisfaction with EXCEED services continues to remain very high.

It is a privilege to see the EXCEED values of Respect for all People, Creating Opportunities and Choices, Quality Environment, Self-directedness, and the Future, put into practice and producing such amazing results.

Lee Trisler
Chief Executive Officer



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

EXCEED employed 184 staff during the 2022-2023 year: Including full-time, part-time, temporary and as-needed
Staff Retention Rate: 46% over 90 days: Average Staff Tenure: 6.5 yrs

Safety

The Safety Committee (Representatives from all program areas and Safety Chairperson) met 12 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 residual effects from the 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 the Riverside, Hemet/San Jacinto, and Menifee Valley Chambers of Commerce, along with California Disability Services Association (CDSA) and Inland Regional Center (IRC) events.

For the 2022-2023 year, we received the following grants:

Riverside County Transportation Commission (Measure A), \$107,047;

Federal Transportation Administration/CalTrans (5310 Transportation Grant), \$48,930;

City of Hemet, Community Development Block Grant (Art in the Park) \$14,000

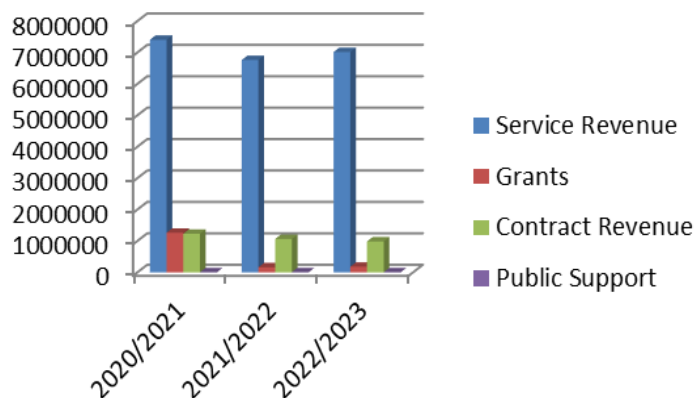
Soboba Foundation, \$1000, City of Hemet, \$1750; The Knights of Columbus \$1011, Non-Profit's United, \$758

Public support remained strong with generous gifts from the following:

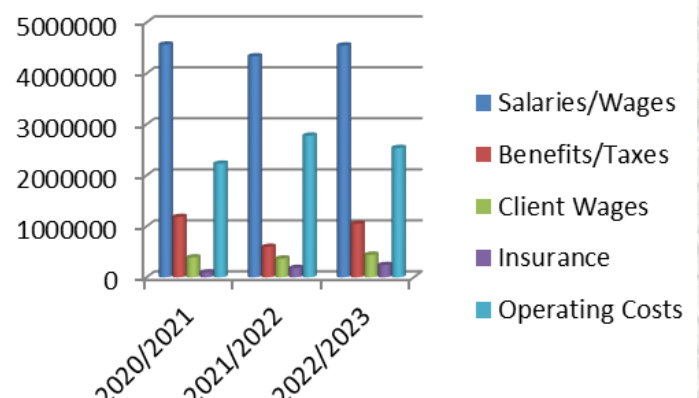
HCN Bank, Dr. Richard Giese; Mr. & Mrs. Vince Ponce; Mr. & Mrs. Mark McGargill; Mr. & Mrs. Tom Wilson, Ms. Joyce Nelson, and Mr. John Dietrich

Financial Report

Revenue



Expenses



COMMUNITY EMPLOYMENT SERVICES

7893 Mission Grove Pkwy South, Suite C
Riverside, CA 92508



Community Employment Services provides a combination of individualized training and support services to enable clients achieve and maintain employment in a integrated natural settings in the business community.

Supported Employment

Individual Placements (IP's), receive initial support services from an EXCEED Vocational Trainer in areas such as jobsite 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.

175 CLIENTS SERVED



AVERAGE TENURE 7.7 YRS
(NATIONAL AVERAGE 4.3 YRS)

CARF ACCREDITED SINCE 1987

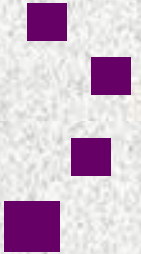
THANK YOU TO OUR
EMPLOYER PARTNERS!

At Home
AutoZone
Clayton Homes - Perris
Carol's Kitchen
Deal Buster
Del Taco
Essendant
Food 4 Less
Home Depot
HomeGoods
Jenson USA
Lowes Regional DC
March Air Reserve Base
Phenix Technology Inc.
Ralphs
Soboba Country Club
Smart & Final
Sonic Burger
Target
TJ Maxx
Vons
Walgreens Regional DC
Walmart



COMMUNITY INTEGRATED SERVICES

1285 North Santa Fe St., Hemet
40119 Murrieta Hot Springs Rd., Suite B104, Murrieta
7891 Mission Grove Pkwy South, Suite C, Riverside
170 Wilkerson Ave., Perris



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.



**145 CLIENTS
SERVED**



**ALL CLIENTS
ACHIEVED AT
LEAST ONE OR
MORE OF
THEIR GOALS!**

ADULT DEVELOPMENTAL CENTERS

1285 North Santa Fe St., Hemet
2050 Trumble Rd., Perris

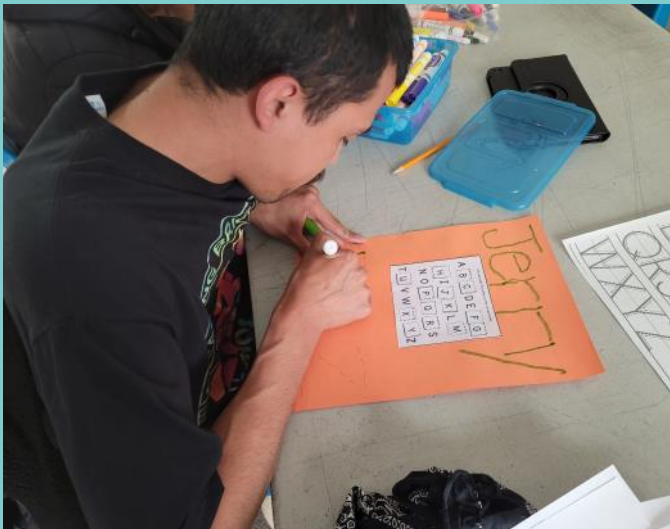
The Adult Developmental Centers in Perris and Hemet provide basic living skills training, to help clients reach their maximum level of independence, along with access and inclusion in the community.

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

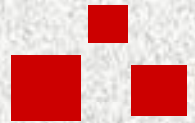
92 CLIENTS SERVED

85% OF CLIENTS ACHIEVED 1 OR MORE OF
THEIR GOALS



EXPLORATION & ENRICHMENT SERVICES

1285 North Santa Fe St., Hemet
170 Wilkerson Ave., Perris



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.



**106 CLIENTS
SERVED**

**73% OF
CLIENTS
ACHIEVED AT
LEAST ONE OR
MORE OF
THEIR GOALS!**



CASA DEL VALLE

San Jacinto, CA 92583



The Casa del Valle Residential facility 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



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STATE OF CALIFORNIA,
DEPT OF SOCIAL
SERVICES,
COMMUNITY CARE
LICENSING



ART IN THE PARK

The Art in the Park project began in July 2021, through City of Hemet's Community Development Block Grant, where we sought funds to provide a meaningful art experience for adults with disabilities, to foster inspiration, community integration and good health.

This project stresses the importance of the process and expression, rather than the technical aspects of the final product, and the belief that everyone has the potential to use art materials and be creative and expressive regardless of training, experience or talent.

The project sessions have been held at Mary Henley Park, weather permitting.

In March 2023 we were pleased to be able to present our first art show to exhibit the works of our clients that were completed during these sessions with the help of our "Art Facilitator", Nancy Espensen who has worked tirelessly to help our clients unlock their creativity.



141 CLIENTS
SERVED



Major Accomplishments

- 97% of clients in our Day Programs returned to in-person services
- The average Supported Employment IP job placement retention rate is 7.7 years and the average wage is \$17.86
- Even though clients did not return to in-person services until mid-year, we significantly increased the number of program hours spent in the community
- We had a very successful Art Show event that showcased our clients art, this lead to the City of Hemet inviting EXCEED to display the client's artwork at various City facilities.
- We successfully applied for and received ERC funds
- The Person-centered Thinking Committee was developed to review, revise and implement PCT process in case management and related systems
- EXCEED participated in CDSA events and input to legislators
- Client satisfaction levels remain high even with staff shortages and the transition from remote to in-person service
- Even with severe staff shortages the transportation department was able to provide service to all authorized clients and help Day Programs with community activities
- The Art in the Park project received a grant from the City of Hemet to continue for another year
- The CES program Director developed and submitted a program design to DOR for a new service model
- The CIS and E&E Programs developed 14 new volunteer sites

Challenges and Expectations Not Met

- We were not able reach our goal of 80% of the vacant direct staff positions filled. Our inability to offer complete wages due to insufficient State funding, resulted in unfilled position and having to hire less experienced and less capable staff.
- We did not achieve our staff retention rate goal. Many times the staff that were hired left for higher paying jobs or had to be let go for poor performance and safety issues.
- IRC struggled for most of the year to provide timely, correct authorizations for service. This delayed clients receiving service and affected our revenue projections.
- CES program lost three of their long time group contracts due to businesses cutting back on expenses
- The thrift store has not performed as well as expected. We will review the sale during the first part of the new fiscal year and based on results we may decide to close the store.
- We were not able to find appropriate sites to relocate the Perris ADC or Transportation Dept.
- We were unable to get a rate adjustment for the E&E programs. The current rate is not sufficient to cover the cost of operating this service.

What We Want to Accomplish Next Year

- We want to fill 80% of direct staff position. Explore new recruiting methods and attend job fairs
- Most of the clients in the E&E program will transfer to the CIS program.
- Fully implement the PCT systems and put more of the client file onto the Case Magic system which will reduce hard copy files, and storage issues
- Fill vacant positions on the Board of Directors
- Relocate Perris ADC and Transportation Dept.
- Replace several of the transportation vehicles: receive the grant vehicle that were awarded 2+ years ago
- Prepare for the CARF Accreditation Survey
- Become vendored and operate the new Options Explored service (CES)
- Have a second Art Show event
- Have at least one Parent/Care provider & Community information event