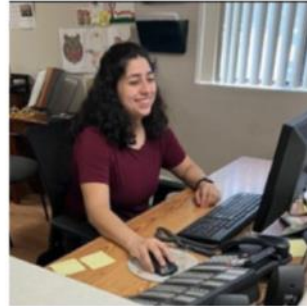


ANNUAL REPORT 2023-2024



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, 2023 - June 30, 2024
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 Employment Services Programs, and by The Department of Rehabilitation for our Community Employment Services Programs.

Our Employment Services and External Situational Assessment 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 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



**Kathy
Bloom-Rudibaugh**
Attorney



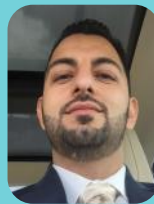
Tom Wilson
Communications
Director
Abacus Credit
Counseling



Richard Williams
Rehabilitation
Specialist
(Retired)



Michael McIntyre
Owner
Hemet Escrow
Founder



Shade Awad
Business Developer
Entrepreneur



Dr. 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



Over the past year, we have experienced numerous successes and accomplishments, even in the face of significant challenges such as staff shortages and underfunded programs. Despite these obstacles, the individuals we serve have continued to thrive and achieve their goals.

One of our major successes has been the development of the Art in the Park project, which originated during the pandemic. These art sessions provided our clients with a unique opportunity to explore their creativity, collaborate on projects with their peers, and foster a sense of pride in their accomplishments.

The culmination of this project was a highly successful public art show that allowed the community to celebrate the remarkable works and talents of our clients. A notable outcome from the art sessions has been the personal growth of our clients. As they gained confidence, those who previously struggled with social interactions began to engage more with others, enthusiastically sharing their artwork and explaining their artistic processes and unique creations.

In addition to the art show, the City of Hemet showcased our clients' work in several public buildings, further highlighting their talents and contributions to the community.

This success is a testament to our dedicated and hardworking staff, whose commitment has enabled our clients to meet their goals. We are proud to report that the level of satisfaction with EXCEED services remains very high.

It is a privilege to witness our core values-Respect for All People, Creating Opportunities and Choices, Quality Environment, Self-Directedness, and a Focus on the Future-put into practice, yielding such amazing results. Together, we continue to make a meaningful impact in the lives of those we serve.

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 121 staff during the 2023-2024 year: Including full-time, part-time, temporary and as-needed
Staff Retention Rate: 65% over 90 days: Average Staff Tenure: 7 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.
Our CHP terminal inspections resulted in no problems cited.

Marketing & Resource Development

We attended 109 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 2023-2024 year, we received the following grants:

Riverside County Transportation Commission (Measure A), \$147,256;

Federal Transportation Administration/CalTrans (5310 Transportation Grant), \$135,754;

City of Hemet, Community Development Block Grant (Art in the Park) \$9,000, Soboba Foundation, \$12,000, Knight's of Columbus Council #5528 \$1417, Southern California Edison \$1,250, Non-Profit's United, \$750

Public support remained strong with generous gifts from the following: HCN Bank, Dr. Richard Giese; Mr. & Mrs. Mark McGargill; Mr. & Mrs. Tom Wilson, Mr. & Mrs. Vern Lawson, Mrs. S. Zaragoza

In December 2023, EXCEED staff and clients participated in the City of Hemet Christmas Parade!



In April 2024, we were granted 4 buses from the Cal Trans/ 5310 Enhanced Mobility for Seniors and Individuals with Disabilities Program



Financial Report

Revenue

Year 2023/2024

Service Revenue	\$7,513,145
Grants	\$ 382,598
Contracts	\$ 492,342
Public Support	\$ 29,024

Expenses

Year 2023/2024

Salaries/Wages	\$4,833,747
Client Wages	\$ 286,092
Benefits/Taxes	\$1,090,001
Insurance	\$ 203,164
Operating Costs	\$2,904,968

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 to achieve and maintain employment in integrated natural settings in the business community.

Employment Services

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.

Options Explored

A variety of person-centered services designed to assist individuals, age 16 and up, in becoming successful in the pursuits of their choice.

THANK YOU TO OUR
EMPLOYER PARTNERS!

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



CARF ACCREDITED SINCE 1987
AVERAGE TENURE 7.0 YRS
(NATIONAL AVERAGE 4.2 YRS)



146
CLIENTS
SERVED



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.

Support is provided utilizing the natural resources in each individual's community.



**170 CLIENTS
SERVED**



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



ADULT DEVELOPMENTAL CENTER

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**



91 CLIENTS SERVED

**88% 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.



**75% OF
CLIENTS ACHIEVED
AT LEAST ONE OR
MORE OF THEIR
GOALS!**



**82 CLIENTS
SERVED**

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 enhance their independence and participate in the living and working patterns of their community.

We were thrilled to be the recipients of the Lowe's Heroes project in January 2024. Thanks to the generous efforts of Lowe's volunteers, we were able to install new ceiling fans, a picnic table, and patio chairs. Additionally, they donated a new washer and dryer set and installed outdoor solar floodlights. The volunteers also enhanced Casa's curb appeal by weeding and adding fresh mulch to the front of the house.



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



**CASA DEL VALLE IS HOME
TO 11 RESIDENTS**



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 2024 we were pleased to be able to present our 2nd 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.

The EXCEED "Art in the Park" sessions are sponsored by the City of Hemet, Community Development Block Grant Program and the Soboba Foundation.

**141 CLIENTS
SERVED**



Major Accomplishments

- The average Employment Services IP job placement retention rate is 7.9 years and the average wage is \$20.02.
- We significantly increased the number of opportunities for community access available to CIS participants.
- Programs/services achieved over 96% of their 2023/2024 objectives.
- We had a very successful Art Show event that showcased our clients art. This led to the City of Hemet inviting EXCEED to display the client's artwork at various City facilities.
- We successfully applied for and were awarded a RCTC Measure A 3-year transportation grant for over one million dollars.
- EXCEED participated in CDSA events and input to legislators.
- Client satisfaction levels remain high even with staff shortages and the transition of most E&E clients to the CIS and ADC Programs.
- Even with ongoing staff shortages, the transportation department was able to provide on-time, door-to-door services and provided transportation to volunteer sites and community activities.
- The Art in the Park project received a grant from the City of Hemet to continue for another year.
- We became vendorized to provide Tailored Day Services.
- The Transportation Department was relocated to the Santa Fe facility.
- We installed new fencing and enhanced lighting at the Santa Fe location which greatly reduced vandalism.
- The Community Integrated Services program was certified to provide DOR funded service under the Options Explored Program.
- The number of Adult Work Experience participants more than doubled this year.

Challenges and Expectations Not Met

- Again this year, we were not able reach our goal of 80% of the vacant direct staff positions filled. Our inability to offer competitive wages, stemming from insufficient state funding, has led to unfilled positions.
- We were unable to achieve our staff retention rate goal.
- We did not reach our service or contract revenue goals.
- CES program lost one of their long time group contracts due to businesses cutting back on expenses.
- We were not able to find anyone to take over the thrift store lease. We need to close the store but have several years remaining on our lease obligation.
- We have not yet received the grant vehicles that were awarded over three years ago.
- We were not able to have an Open House Event this year.
- The CES program saw a significant decrease in the number of job placements due to the changing job market and there were fewer appropriate referrals for this service.
- The CIS program is growing rapidly, has several locations, and is a challenge to manage efficiently.

What We Want to Accomplish Next Year

- We want to fill 80% of direct staff position.
- Fully implement the Tailored Day Services Program
- Fully implement the Person-Centered Thinking systems and put more of the client file onto the Case Magic system which will reduce hard copy files, and storage issues
- Add a Case Services Manager to fully implement the Person Centered Planning process, provide training and support for the Service Team Coordinators to ensure quality and consistency in case services.
- Fill vacant positions on the Board of Directors
- Replace at least two of the transportation vans
- Prepare for the CARF Accreditation Survey
- Hire another management staff in the CIS Program
- Have a Third Annual Art Show event
- Have at least one Parent/Care provider & Community Information event