

2016-2017 ANNUAL REPORT



EXCEED

Annual Report 2016 - 2017

MISSION STATEMENT

***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, 2016 - June 30, 2017

Organizational Structure and Compliance

EXCEED, a division of Valley Resource Center, is a California nonprofit organization and has maintained a Federal 501(c)(3) tax exempt status. EXCEED is also licensed through State of California Department of Social Services, Community Care Licensing for the Residential Program and the Adult Developmental Centers and certified by State of California Department of Rehabilitation for the Work Activity Centers and Supported Employment Programs. The Work Activity Center program, Situational Assessment program, Personal, Vocational and Social Adjustment program and Supported Employment program 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 US Department of Labor and the California Labor Board. 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 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 an organizational chart that delineates the lines of authority and supervisory relationships. The chart was reviewed and minor changes were made.

Membership

There is a membership which meets annually in January. Membership is open to all interested persons. Business presented to the members at the annual meeting included the election of directors, the Annual Report and a question and answer period.

We had 62 members at year end. Membership is offered to staff and clients at hire/intake and is open to all interested parties, stakeholders and the public. Applications are available at each facility and on our website at www.weexceed.org

Board of Directors

EXCEED has a 9 -14 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, college administration and Rehabilitation Specialist.

The Board held meetings 10 times this year and had one planning retreat to discuss and revise long-term plans.

BOARD OF DIRECTORS 2016 - 2017



Dr. Richard Giese
Educational
Consultant
President



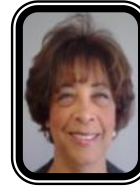
Rev Quinn Hawley
Military Chaplain
(Retired)
Vice-President



Dorothy McGargill
Broker Associate
Century 21
Secretary



Bruce Ortiz
Owner
King Signs
Treasurer



Myrna Torres
Vice President
Bank of Hemet



Arn Lahde
VP Disney
Imagineering
(Retired)



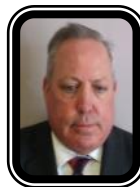
Richard Williams
Advocate
Retired



Tom Wilson
Retired



Vincent Ponce
Superintendent
Perris Elementary
School District
(Retired)



John Dietrich
Attorney
Atkinson, Andelson,
Loya, Ruud & Romo



Michael McIntyre
Owner
Hemet Escrow
Co Inc.



Dennis Murray
Owner
Code 4 Educational
Consulting



Christie Barrett
District Superintendent
Hemet Unified School
District

Management

The Board hires an Executive Director to implement the policies and carry out the responsibility of day-to-day operations of the organization. The Executive Director hires and develops a Management Team. The Team consists of the Assistant Executive Director, Program Directors and Director of Human Resources. The Mid-Management positions are Workshop Manager, Program Managers, Residential Administrator, Program Assistants, Team Leaders, Transportation Coordinator and Vocational Assessment Coordinator.

The Management Team held a planning retreat to review stakeholder input, review progress on objectives, create new objectives for the next fiscal year and develop an annual budget. They also reviewed the Mission, Purpose and Values Statements and determined that no changes or additions were needed.

The Management Team continues to face the challenges of cash flow problems due to being underfunded and the stress of having fewer resources, reduction in staff hours and positions, low staff morale and upkeep of facilities and vehicles.

Service and Support

Direct service staff include: Case Managers, Vocational Trainers, Production and Training Supervisors, Aides, Employment Specialists, Vocational Instructors, Group Supervisors, Drivers, Direct Support Professionals and Instructional Aides.

Support staff positions: Clerks, Secretary/Receptionists, Accounting Staff, Contract Procurement Specialist. We also have workers/trainees paid through Riverside County WEX & SER Programs and Re-Employability Program.

Client Council and Support Groups

Client Council and Support Groups are established at each facility. Support Group meetings are held periodically for Supported Employment clients. These groups are self-governing and provide input to management, advocate regarding their issues to legislators, sponsor community service/fundraising activities and develop social activities. EXCEED provides support and assistance as requested.

Corporate Compliance

All required annual corporate filings were completed. EXCEED is in compliance with Department of Labor, Department of Developmental Services, Department of Rehabilitation and Department of Transportation regulations and requirements. The CARF Accreditation is in good standing.

There were six (6) complaints filed with the Corporate Compliance Officer, all were resolved.

Administration

The Administration Department provides support for the program areas and is responsible for: Personnel, Payroll, Financial Management, Facilities Management, Safety, Contract Procurement, Public Relations (including fundraising), Marketing, Correspondence, Clerical Support, IT Development and Support, Accessibility, Resource Allocation, Risk Management, Monitoring Systems and Compliance, Administering the Program Outcome Measurement System, Case Management, Quality Assurance and various input systems.

Human Resources - Darlene Noon

The current organizational structure was reviewed and minor changes were made. There were a total of 214 persons employed at EXCEED this year; last year there were 208. There were 168 persons employed at year end 2016-2017; Last year there were 163. The average number of staff per month was 167; the same as last year.

These numbers include full-time, part-time and temporary/as needed employees.

FACILITIES & EQUIPMENT

Santa Fe (Hemet):

WAC and ADC programs are housed at this location.

Overall, the buildings are in good condition. We have taken care of and eliminated the leaks we were experiencing in the South East classroom during rainy weather in the ADC. The most difficult maintenance problems are the floors, Air Conditioning units and swamp coolers.

The facility is beginning to show wear. Security continues to be an issue: we have had some vandalism to our vehicles, facility fence and a door panel along with a broken door.

Perris:

WAC, ADC and Thrift Store are at this location. The Thrift Store needs more space since it has picked up the donations and miscellaneous items from the Santa Fe store. When the workshop has more than the usual amount of product, the space is taken from the Thrift Store processing area. The landscaping continues to be difficult to keep up and we need to continue to replace plants with drought-resistant varieties. Two heating units and three coolers in the WAC were replaced. We had to repair an A/C unit in the ADC, along with the A/C unit that covers the front lobby. The floors are very difficult to maintain and the flooring needs to be replaced in at least 5 offices.

The facility is beginning to show the wear that comes with 16 years of use. Security continues to be an issue at this facility. The back fence has been cut and broken into, with minor vandalism resulting, and we had to install a locking trash bin to prevent people from disposing of items that cannot be disposed of in the usual means (oil in barrels, etc.). Anything requiring repair has been tended to within 48 hours of being reported, and the facility is in good overall operating order.

Mission Grove:

The Supported Employment program continues to lease a large office facility that continues to meet our needs. This fiscal year the landlord painted and installed new flooring throughout the facility.

Residential

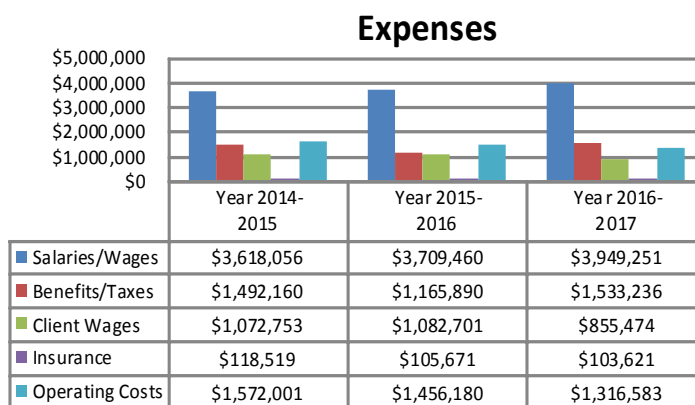
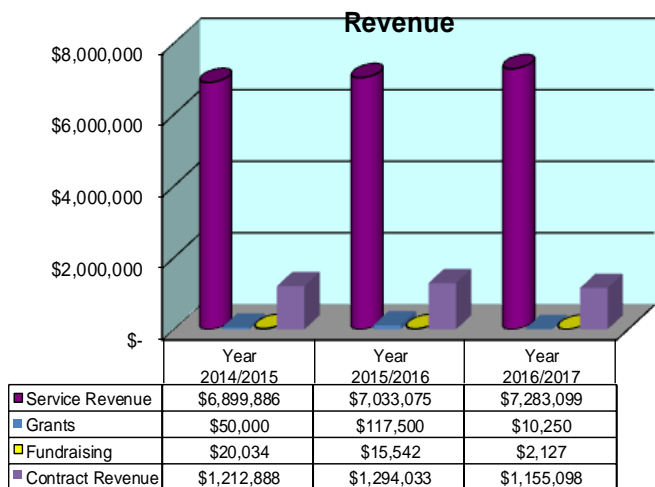
Generally, the home is in good condition. The facility needs to be completely painted inside and numerous furnishings need to be replaced as they are over 10 years old. The kitchen counters were replaced, and we received a new refrigerator and washing machine as part of the "Lowe's Heroes Program". Lowe's also completed several repairs around the home, painted the great-room and hallways and completed some landscaping.

Technology

Network systems have been upgraded at each facility. A new server was installed and the Sage Accounting System was upgraded in administration. We deployed 35 tablets to Supported Employment staff (Vocational Trainers), to enable them to enter casework information in a real-time environment to the benefit of all clients. A comprehensive Technology Plan was developed, along with a plan to implement hardware upgrades where they are needed most.

Financials (Unaudited)

Contract revenue, service revenue and Grant Revenue were significantly below budget. We achieved 94% of revenue budget projections and costs were 96% of budget. We had a net increase in the fund balance of \$9,975 (last year was -\$120,048). Services continue to be seriously underfunded. Due to changes in the DOR/DDS regulations we had to terminate services to some clients and referrals were held-up for about two months.



Safety

The Safety Committee (representatives from all program areas and Safety Consultant/Chairman) met 12 times this year. The committee reviewed the Safety Program, and met with client representatives for their input.

Facilities were inspected by staff each month. No serious problems were noted. Both ADC's and residential facilities were inspected by Community Care Licensing and Inland Regional Center. The Transportation vehicles were inspected by California Highway Patrol and Inland Regional Center. The results of all inspections were no deficiencies in facilities/programs, the transportation dept. had 1 minor fix-it.

All facilities were inspected by an outside agent via our insurance carrier. No major problems were noted. Additionally, all facilities were inspected using the ADA checklist.

There were 72 persons trained in First Aid and 72 in CPR. We have a First Aid/CPR instructor on staff.

There were 74 injury incidents (all minor); last year there were 150. There were 10 Workers' Compensation claims (last year 10); most were in the Perris WAC and Supported Employment Programs. The Safety Committee has analyzed our incident/accident trends, corrective actions and results. For the most part, corrective actions were effective in reducing specific types of incidents. The majority of accidents were slips, trips and falls.

Resource Development, Marketing & Public Relations

We received the following small grants from County Supervisors
 Riverside County 3rd District Supervisor, Chuck Washington - \$2500
 Riverside County 1st District Supervisor, Paul Cook - \$1000
 Riverside County 5th District Supervisor, Marion Ashley - \$1000

The Marketing Team participated in the following groups/events during the year:

- ◆ CDSA Public Policy Meeting
- ◆ CDSA Caucus
- ◆ Inland Regional Center Vendor Advisory Committee
- ◆ Hispanic Chamber of Commerce
- ◆ California Disability Services Association
- ◆ Hemet/Temecula Employment Advisory Council
- ◆ Coalition of Workshops and Supported Employment
- ◆ Chambers of Commerce of Greater Riverside, Temecula and San Jacinto, Hemet/San Jacinto.
- ◆ Hemet San Jacinto Chamber of Commerce, Valley Non-Profit Network
- ◆ Riverside County Office of Education - SELPA

There were 14 presentations about EXCEED programs to various community groups. Last year we did 31 presentations. Staff attended an average of 2.5 community activities per month. EXCEED participated in the CDSA Caucus Partnership Recognition Event and Legislative Breakfast. The parents of one of our clients held a fundraiser for EXCEED and raised \$6,340. We were not able to have our Awards Luncheon due to the high cost of the venue.

Stakeholder Input

The Perris and Santa Fe Client Councils each met 12 times. Their primary activities were: election of officers, planning social activities, and requests for equipment and more contract work. Their activities included: Reviewing Client Personal Rights. They were also very active in supporting the community by collecting soda tabs for Ronald McDonald House, the Santa Fe Facility donated \$100.00 to the Breast Cancer Foundation, and the Perris Facility donated money to the Wounded Warrior Foundation, Red Cross and local charities such as Valley Restart Shelter, Ramona Animal Shelter and Lake Elsinore Animal Friends. Both facilities contributed additional support including the collection of food and purchase of 5 turkeys for Thanksgiving baskets, and providing food and blankets to the animal shelters. Both of the Client Councils also held a Halloween Party on 10/31/16 Christmas Party on 12/22/16 and Valentine’s party on 02/14/17. Representatives from both facilities’ Client Councils gave a presentation to the Board of Directors in April and provided them with input as to the needs of the clients and their satisfaction with the programs.

Based on Clients requests we purchased new tables and chairs, iPads and microwaves. The Client Councils sponsored 4 social events at both the Perris and Hemet facilities. EXCEED sponsored 2 dances/social events for clients.

EXCEED held a Harvest Festival Dance and a Spring Fling Dance for the ADC, WAC and SE in West County area. Perris, Santa Fe and Supported Employment had Thanksgiving celebrations. The Client Councils sponsored 6 social activities at each facility. The Supported Employment staff raised funds and secured a venue for a Christmas party for their clients.

Input to Legislators

There were 5 visits to legislators and EXCEED helped to sponsor the annual CDSA Inland Empire Caucus Legislative Breakfast and Partnership Recognition event which was hosted by Senator Leyva.

Client Survey Results

Each client was surveyed twice during the year at their planning conference as to their level of satisfaction with services and facilities. Response choices were “Excellent”, “Good”, or “Poor”. The objective is to have on average at least a 2.5 rating out of a possible 3 points.

Adult Developmental Center

The average annual satisfaction rating, collected from the client survey at the semi-annual review, was Perris 2.89 and Santa Fe 2.81 out of a possible 3 points.

Work Activity Center

The average annual satisfaction rating, collected from the client survey at the semi-annual review, was 2.50 for Santa Fe and 2.84 for Perris out of a possible 3 points.

Supported Employment

Clients’ satisfaction – averaged rating for the year 2.75 of a possible 3 points

Residential

100% at Good or Better

All Programs Exceeded Their Minimum Goal

Staff Survey

92% rated their overall level of satisfaction at very good or better (our goal was a minimum of 85%); last year was 89%. The main concern voiced in the survey was for an increase in pay.

Contract and Employer Surveys

Overall level of satisfaction	<u>Employers</u>	<u>Contracts</u>
	83% at Very Good or better	Not surveyed this year

Parent/Care Provider Survey

Rating for overall satisfaction (Based on 164 survey responses):

	<u>Last Year</u>	<u>This Year</u>
Excellent	55%	44%
Very Good	32%	42%
Good	13%	12%

Funder Survey

The overall rating was 100% at very good or better; (The minimum goal was 95%) The highest level of satisfaction was with the responsiveness to client needs, providing a safe and healthful environment and service coordination. The lowest area was with the quality of documentation and timeliness of services.

Service Quality Assurance Panel

The Service Quality Assurance Panel met monthly (11 of 12) to review general record keeping and monitor the quality of the delivery of services including: timeliness of service delivery, flow of client records, development of client plans, thoroughness of documentation, client satisfaction, special accommodations provided and client participation. Guidelines used were CARF standards, Title 17 and 22 and IRC’s Quality Assurance tool.

About halfway through the fiscal year the panel began reviewing files using the Case Magic system. This was done by having some of the panel members use computers to complete the Records Review audits and others conducted the client interviews, both scoring their findings. Members then collaborated to complete the scoring process where there was overlap.

All programs surpassed their program objective minimum quality rating and ended the review process with 100% of their files in compliance. This year, ESA/PVSA was able to achieve a perfect score of 2.0 for its second review.

PROGRAMS

Adult Developmental Centers – Kathy Coake and Pedro Zambrano

Purpose: Provide training and activities that allow adults with developmental disabilities to reach and maintain their highest potential, to maximize their level of independence, and increase their opportunities to exercise personal choice and self-advocacy.

Services Provided: Training in independent living skills such as: Self-Care, Housekeeping and Cooking, Safety and Emergency Procedures, Survival Skills, Health and Hygiene. Training in Social Skills, Self-Advocacy, Community Access and Inclusion, Gross and Fine Motor Skills, Recreation and Leisure Skills. The program offers Pre-Vocational Training, Basic Academics, Physical Education and Senior Activities. It also provides assessments and referrals. This training is designed for clients who require constant assistance and supervision at a staffing level of 1:4.

There are two facilities: The Adult Developmental Centers in Perris and Hemet provide training in simulated environments, classrooms and in the community with an emphasis in using money, grooming, health and nutrition, literacy, training in appropriate social behavior, self-advocacy and personal safety. Training at community sites included: Golden Era Golf Clinic, community centers and parks, Libraries, T.H.E. Center, Perris Fairgrounds, Diamond Valley Lake, San Jacinto Movie Theater, the Bowling Alley, Animal shelters, Petco, Hemet Post Office, The City of Hemet, Pumpkin Patch, Temecula Duck Pond, several retail stores, museums and food establishments. The clients also enjoyed participating in community service activities at Devonshire Care Center and Ramona Rehabilitation, the Golden Era Golf Clinic, T.H.E. Center, Ramona Humane Society and Animals Friends of the Valley, as well. The clients also participated in community service at recycling centers and a church.

There were 18,527 units of service (client service days) provided to 97 clients (59 in Perris, 38 in Hemet). The previous year we served 101 clients. Both Programs have been near capacity for the year.

Overall, the objectives for this program appear to be appropriate and reflect the program’s achievements.

	Goal	2014-2015	2015-2016	2016-2017
Transition to Work Program	1 person	SF - 2 P - 0	3 persons (2 SF/1 P)	1 person (0 SF/1 P)
Hours in integrated setting	3,000-4,000 hours	SF 2549 hrs P 3620 hrs	SF 1829.5hrs P 4662 hrs	SF 2236 hrs P 4507 hrs
Attendance	89% - 96%	SF 91.0% P 89.6%	SF 89.0% P 89.7%	SF 89% P 90%
Clients achieving goals	SF 60-75% P 90-100%	SF 92.0% P 94.7%	SF 77% P 100%	SF 72% P 98%
Participation in community service activity	2–4 activities/ month avg.	SF 1.25 /mo P 2.08 /mo	SF 1.08 /mo P 2.83 /mo	SF 2.7 /mo P 3.6 /mo

Work Activity Center - Pedro Zambrano and Kathy Coake

Purpose: To provide assistance to adults with developmental disabilities in developing and maintaining vocational, social and behavioral skills, in order that they may obtain employment in the environment of their choice.

Services: Job Skills Training, Work Tolerance, Work Behavior Training, Assessment, Counseling, Remunerable Work, Advocacy, Safety Procedures, Referrals, Adaptive Work Stations/Equipment. The WAC also provides group Supported Employment such as lawn maintenance, janitorial, Thrift Store crews and on-site assembly.

There are 2 WAC locations: Hemet (Santa Fe Street) and Perris (Trumble Road).

There were 376 clients (193 in Perris and 183 in Hemet) served this year (last year 417). The numbers decreased partially due to the WIOA regulations which restricted clients under 24 yrs. from participating in the program.

*29 clients did not have a intellectual disability diagnosis, but did have a diagnosis of severe C/P or Autism.

There were 78 program exits and 19 transfers to other EXCEED programs, There were 59 referrals received and 43 new admissions. 14% of the clients have attended program one year or less and 55% have been enrolled 3 or more years.

16 clients transitioned to Supported Employment, last year there were 14. The objective was to transition 7-10 clients.

	Minimum Objective	Results Last Year	Results This Year
Time in Paid Work			
Santa Fe	50%	56%	37.0%
Perris	50%	52%	20.8%
Program Participation (attendance)			
Santa Fe	86%	86%	86%
Perris	86%	90%	90%
Increase client productivity (# of clients increasing their production rate each quarter - average for the year)	Santa Fe 25-35 each quarter	26	25
	Perris 60-75 each quarter	64	62
Clients achieving one or more goals			
Santa Fe	96-118	105	97
Perris	160-180	188	174

WAC – Enclaves

We deleted all on-site enclaves except for the 2 thrift store groups. The California Department of Developmental Services determined that our on-site groups did not meet the definition of integrated groups.

Transportation

Purpose: To provide dependable curb-to-curb transportation service to EXCEED clients, enabling them to get to and from their program.

Program Goal: To provide clients with on-time transportation service using dependable, well-maintained vehicles operated by certified, well-trained drivers.

A total of 86 clients were transported this fiscal year. We have consolidated the program and reduced the number of routes to increase efficiency and reduce costs.

We received 6 referrals. There were 12 exits. There were no new routes added and one route was deleted.

We have a transportation fleet of 14 vehicles. One is out of service.

Our CHP Terminal Inspection resulted in 5 minor problems cited. Our objective was to have no more than 4 problems found during inspection.

All routes are scheduled to be less than 2 hours. Our goal was to have all routes less than 1 hour but this was not feasible due to consolidation, we will adjust our objective next year.

Residential - Andrea Wells, Lori Larsen

We began the fiscal year with 12 residents. At fiscal year-end we were at capacity with 14 residents. We learned from Licensing that we could request more than 15% (3) of our residents with age exceptions (over age 59) to continue to reside with us. We now have 4 with age exceptions.

Some progress was made with clients achieving IPP goals, not enough though to achieve this goal of 90%. Only 4 clients achieved 5 goals (31%). Casa staff received trainings on the implementation of IPP goal methods and documentation thereof.

The dining room chair pads need to be replaced, and new tables are in the process of being made. Lowe's replaced the stove. Lowe's Heroes will be returning next fiscal year to continue work on the house. They will be replacing the shower in the single bathroom along with other small projects.

This year, ongoing activities included dances, movies, and bowling. Some of the other activities were the Festival of Trees, and the Festival of Lights in Riverside, Myrtle Creek, UCR Botanical Gardens, Valley Wide Aquatic Center, Perris Speedway, The Living Desert, a 66er's baseball game, Perris Rods and Rails, and IRC CSC Casino Night. The residents love to shop and eat out. Our goal for community hours (3400 to 4200 hours) was achieved as we had a total 4149.25 hours spent in community activities.

We achieved our program goals for the IRC Annual QA review being 99% in compliance, Licensing QA with 0 deficiencies, home at capacity, providing community outings, and having an efficient medication program with 0 med errors. Our satisfaction survey reflects that 100% of our residents are satisfied with their services, rating at good to excellent.

Supported Employment – Marie Chatman

Purpose: To provide individualized training and support services that will enable clients to work independently and achieve their fullest participation in integrated employment settings of their choice.

Program Goal: To provide a combination of support services in community-based employment for adults with developmental disabilities and Department of Rehabilitation clients so that they may achieve and maintain employment in integrated natural settings in the business community.

173 clients were served in individual placements and enclaves this fiscal year as compared to 166 last year. Clients diagnosed with Intellectual Disability remained the primary disability group being served. 33 clients experienced a job loss for reasons including: poor attendance, dangerous behaviors, lay off, uncontrolled medical concerns, sexual harassment towards co-workers, theft, moved out of area and inappropriate interactions.

There were 179 referrals this year of which 74 individuals were accepted into the program and 54 were actually enrolled and placed during the fiscal year. Of significance is 52 clients cancelled during the referral/intake process for the following reasons: no return calls/no show (15), not interested in working (5), decided to remain in current program/school (6), obtained their own job (6), chose another program (11), wants a professional job/salary (1), moved (3), obtained an injury (1), unable to offer appropriate group job opening (3) and didn't want to lose SSI benefits (1) .

We were able to meet our minimum goal of 95% of intakes taking 10 days or less from interview to request for authorization. This is attributed to the intake process being revised and meetings with Department of Rehabilitation only available on a limited basis.

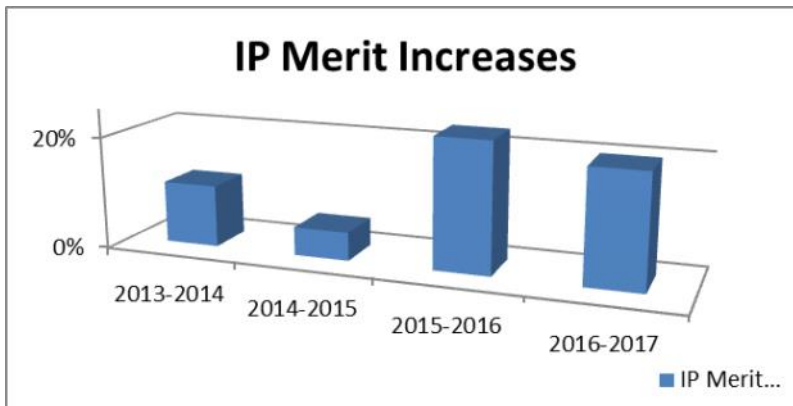
Supported Employment				
YEAR	2013-2014	2014-2015	2015-2016	2016-2017
IP Wage Avg.	\$11.47	\$11.87	\$12.64	\$ 12.91
Group Wage Avg.	\$6.12	\$6.18	\$6.40	\$ 6.55

The program saw a significant increase in the IP average wage at \$12.91, exceeding our goal to be between \$12.25- \$12.75. This can be attributed to the increase in minimum wage, several clients receiving raises and placements are being made at sites whose starting pay is significantly above minimum wage. We will adjust the goal for next fiscal year to reflect that this trend will continue.

We met the goal for clients receiving a promotion on the job. Our goal was between 1 and 4, the actual was 2. The percent of clients starting pay above minimum wage was 40%, showing no change from the 40% of last fiscal year. We have continued to place a large number of our clients at Distribution Centers that utilize Employment or temp agencies which start all employees at minimum wage and then will increase once the employee is hired by the company.

We had 81% of Group clients receive a merit increase. This exceeded our goal of 60% and was a significant increase from last year's 54%. An increased emphasis continues to be placed on ensuring Vocational Trainers are aware of the task standards, schedules and job procedures that are to be followed. This translated over into more proper training given to the clients on exactly how to perform tasks according to standards.

Our minimum goal was 11 clients moving from group to Individual Placements. We had 11 clients make this move. This remains the same as last year. This can be attributed to the fact that clients being placed in groups at this time are requiring more interventions, training and support to get them prepared for competitive integrated employment.



Supported Employment				
YEAR	2013-2014	2014-2015	2015-2016	2016-2017
New Job Sites	16	20	13	10
New Enclave Stations	0	3	12	6
Additional Placement – Existing sites	6	11	26	32

We were unable to meet our minimum goal of 15 new job sites developed. This was in part due to the fact that we only had 1 Employment Specialist for most of the fiscal year. Another factor was that there is a significant push by employers to hire clients at existing sites and significant resources were used to make this happen. Therefore, we far exceeded our maximum goal of 20 for placements at existing sites by making 32 placements. We were unable to meet the minimum of 9 new enclave stations. We recommend decreasing the minimum and maximum going forward. Due to new legislation and the high expectations of employers, placing enclaves continues to be a challenge.

Benefits:

In all categories, we saw a significant increase in benefits from the previous year. This can be attributed to the fact that several placements were made this year at distribution centers, where the benefits tend to be more generous.

Benefit	2013-2014	2014-2015	2015-2016	2015-2016
Health Insurance	36	29	39	88
Life Insurance	10	9	25	40
Holiday Pay	112	86	94	135
Sick Pay	117	89	98	163
Vacation Pay	78	63	50	65
Retirement Plan	13	11	21	32
Profit Sharing	6	6	12	18

PVSA/ESA - Andrea Wells

PVSA – The Personal, Vocational and Social Adjustment Program is designed to enhance positive, acceptable social and work related behaviors

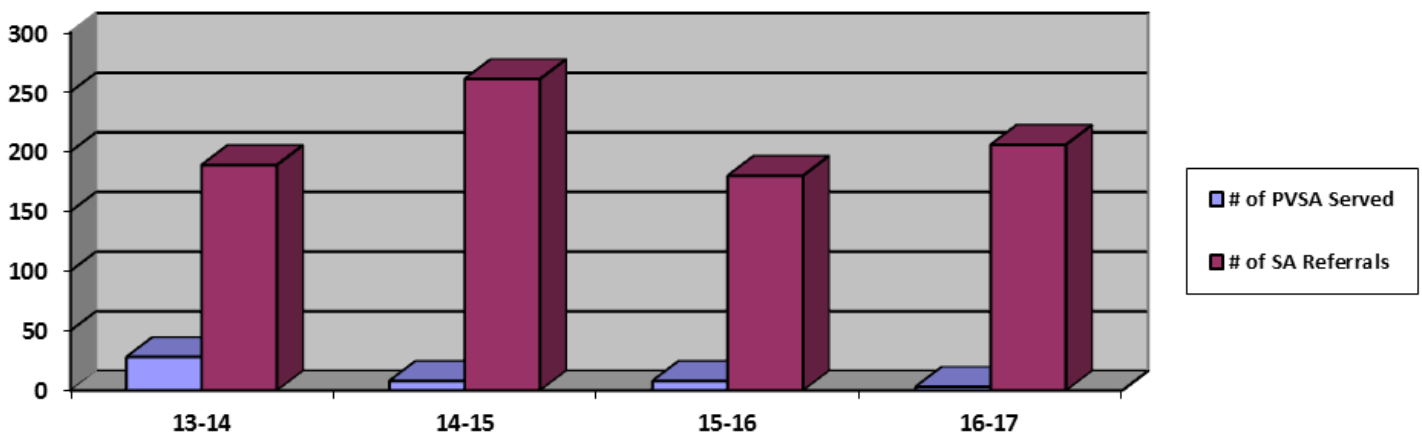
We served 3 PVSA clients this year (last year 8). 100% successfully completed their plan per their schedule and/or authorization and 100% of those placed in jobs retained them for at least 90 days. 100% of the PVSA clients served expressed satisfaction with their services. No clients were denied PVSA services.

ESA – An External Situational Assessment is designed to evaluate the client’s functional capacity for community based work in relation to supported or competitive employment and to identify barriers to employment. An assessment is made of the client’s work habits, vocational interests, attitude, motivation, and supports from home, available transportation, work and social skills, and work tolerance, through actual participation in various community paid work experiences, corresponding to the client’s abilities and desires.

206 clients were referred for SAs (180 last year) of which 36 clients had their cases closed by Department of Rehabilitation prior to onset of services, or were partially served due to medical reason or client request. Of the total clients served, 9 were referred by the Palm Desert branch of the Department of Rehabilitation. About a third of the way into the fiscal year, we made the decision to no longer provide in the geographic area of the desert branch. One of our assessors was commuting from the desert; however, once he left the program, it was no longer cost effective to service this area.

This fiscal year 2016-2017 there were only 2 clients denied services. Both clients did not meet the program entrance criteria for being able to participate in the assessment due to significant physical limitations. In the prior fiscal year, 2015-2016 there were also 2 clients denied services. Also, during this period, there were 18 total clients who exited from services voluntarily, prior to completion. During the 2015-2016 fiscal period there were 7 clients who voluntarily exited from services. This fiscal year, 16 clients were exited involuntarily (behaviors dangerous to self or others and absenteeism) this fiscal year. There were 10 clients who were exited involuntarily in the previous fiscal year.

In terms of other program goals, initial services provided were considered timely as 100% of the clients held their Initial Meetings within two weeks from receipt of authorization and referral information from Department of Rehabilitation; additionally, 100% began their assessment within two weeks of their Initial Meeting. 100% of the SA clients completed their assessments within the authorized timeframe. 100% of the clients who were placed in jobs retained them for at least 90 days. 100% of the SA clients served were satisfied with their services.



SUMMARY

Major accomplishments

- ◆ We participated in the CDSA Legislative Breakfast and met with members of the legislature
- ◆ We made 14 presentations to various community groups
- ◆ There were 173 clients working in the community
- ◆ The average starting wage for IP increased to \$12.91, last year it was \$12.64, and the number of clients starting their jobs at above minimum wage increased 50%
- ◆ Client, parent/care provider and funder satisfaction remains high.
- ◆ The staff survey results met or exceeded expectations.
- ◆ An average of 87 clients in the Work Activity Centers increased their production rate each quarter and 271 clients achieved one or more of their goals.
- ◆ Our buildings are attractive and well-maintained despite being over sixteen years old.
- ◆ The results of our outside inspections by funders and regulatory agencies are consistently very good.
- ◆ 6743 client hours of service, in the ADC programs, were provided in the community.

Challenges and Expectations not met

- ◆ Procuring work for the workshops fell very short of our goal again this year.
- ◆ The inability of IRC to adjust the rate for transportation service and high cost of fuel and vehicle repairs caused the transportation department to end the year in the red.
- ◆ We were not able to meet projections for our document destruction business this year.
- ◆ Time in paid work in WAC programs fell short of goal.
- ◆ Staff retention rate was lower than our goal.

What we want to accomplish next year

- ◆ Continue to inform legislators of the value of productivity-based compensation (sub minimum wage) for our clients.
- ◆ Increase the number of people in Supported Employment placement and client service hours in the community/integrated work settings. (ADC & WAC)
- ◆ Increase our revenue and increase the staff and client wages
- ◆ Operate a successful shredding business
- ◆ Have satisfied clients, parents/care providers, funders, employers and customers
- ◆ Revenue to exceed expenses by 1.0% at year end
- ◆ Have a Celebration of Success event
- ◆ Fully implement the DDS grant to increase employment skills and opportunities for clients in Work Activity Programs.