

To Provide Service and Advocacy,  
Which Creates Choices and Opportunities,  
for Adults with Disabilities to Reach their Maximum Potential



**ANNUAL REPORT  
2018-2019**

## **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, 2018 - June 30, 2019

Valley Resource Center for the Retarded Inc., dba EXCEED, is a California nonprofit organization and maintains a Federal 501(c)(3) tax exempt status.

EXCEED is licensed through State of California Department of Social Services, Community Care Licensing for the Residential Program and the Adult Developmental Centers and certified by the State of California Department of Developmental Services for the Work Training Centers and by The Department of Rehabilitation for Supported Employment Programs.

The Work Training Center Program, Situational Assessment Program, Personal, Vocational and Social Adjustment Program and Supported Employment Programs are accredited by Commission on the Accreditation of Rehabilitation Facilities (CARF). EXCEED has been granted a Sub-Minimum Wage certificate for base programs and enclaves by the U.S. Department of Labor and the California 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 a membership which meets annually in January. Business presented to the members at the annual meeting included the election of directors, the Annual Report and a question and answer period. Membership is open to all interested persons and applications are available at each facility and on our website at [www.weexceed.org](http://www.weexceed.org).

## BOARD OF DIRECTORS 2018-2019

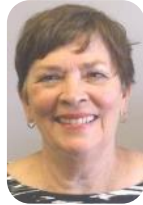
This Annual Report is dedicated to long-time board member and client advocate, Arn Lahde who passed away in December 2018.



**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)



**Rich Biber**  
Community Liaison  
Hemet Valley Hospital



**Richard Williams**  
Advocate  
Retired



**Tom Wilson**  
Communications  
Director  
Abacus Credit  
Counseling



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



**Michael McIntyre**  
Owner  
Hemet Escrow



**Dennis Murray**  
Owner  
Code 4 Educational  
Consulting



**Grant Bennett**  
Superintendent  
Perris Union High  
School District



**David Pyle**  
Superintendent  
Nuview Union  
School District

### Board of Directors

EXCEED has a 9 -16 member volunteer Board of Directors. While the Bylaws make no provisions for the composition of the Board, the current Board represents a variety of community interests and expertise including: financial management, insurance, real estate development, parent/client interest, clergy, business owners, legal issues, community leaders, school facilities development, school administration and rehabilitation specialist.

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

We were deeply saddened to report the passing of our newest board member, Rich Biber, in March 2019.

### Management Team

The board of directors appoints a CEO to implement policies and manage the day to day operations of the organization. Each year the Management Team holds a planning retreat to review stakeholder input, review progress on objectives, create new objectives for the next fiscal year and develop the annual calendar and budget.

The Management Team consists of the Directors of Training Center Programs, Director of Human Resources, Director of Community Employment Services and Director of Marketing & Resource Development.



Lee Trisler, CEO



**Pedro Zambrano**  
Director of Training  
Center Programs  
Hemet



**Kathy Coake**  
Director of Training  
Center Programs  
Perris



**Marie Chatman**  
Director of  
Community  
Employment  
Services



**Darlene Noon**  
Director of  
Human  
Resources



**Sandra Aldridge**  
Director of  
Marketing &  
Resource  
Development

**2018  
2019**

**ADMINISTRATION**

**Administration**

The role of the Administration Department is to provide support for programs, develop resources, procure contracts, 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 and Sales, Resource Development, Quality Assurance and Compliance, Fundraising, Clerical Services, Staff Training and Development, Safety Program Training, Technology Planning & Development and Purchasing

**Human Resources**

154 Employees: Includes full-time, part-time, temporary and as-needed  
 Staff Retention Rate: 73% over 90 days  
 Four "Employee of Excellence" Celebrations, honoring outstanding employees in each program area  
 Monthly Wellness Meetings & "The Biggest Loser" Weight loss challenge

**42% OF EXCEED  
STAFF HAVE BEEN  
EMPLOYED  
LONGER THAN 5  
YEARS!**

**FIRST AID TRAINED STAFF  
72**

**CPR TRAINED STAFF  
72**

**Safety**

The Safety Committee (representatives from all program areas and Safety Consultant/Chairman) met 10 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. The Adult Developmental Centers and our residential facility were inspected by Community Care Licensing and Inland Regional Center. The transportation vehicles were inspected by CHP and Inland Regional Center.

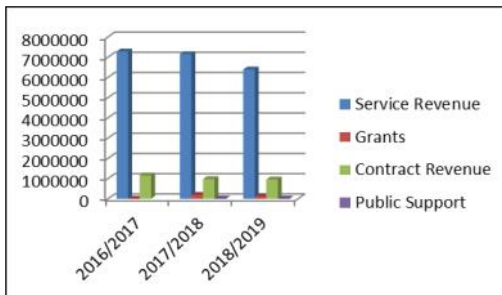
**Marketing & Resource Development**

By the end of the fiscal year we were members of 5 Chambers of Commerce and attended more than 80 Chamber events in the Inland Empire. There were 15 facility tours/presentations to various community groups. EXCEED participated in the CDSA Caucus Partnership Recognition Event and CDSA Legislative Breakfast and we met with 5 legislators to discuss funding issues.

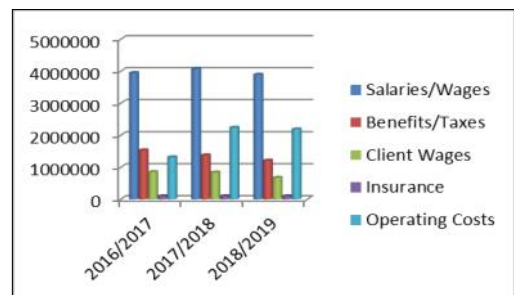
We received the following program grants: DDS/Inland Regional Center, \$123,980; Riverside County Transportation Commission Grant, \$57,000; Edison International, \$5,000; Riverside County 3rd District Supervisor, \$2,000; Smart & Final \$300

**FINANCIALS (UNAUDITED)**

Revenue



Expenses

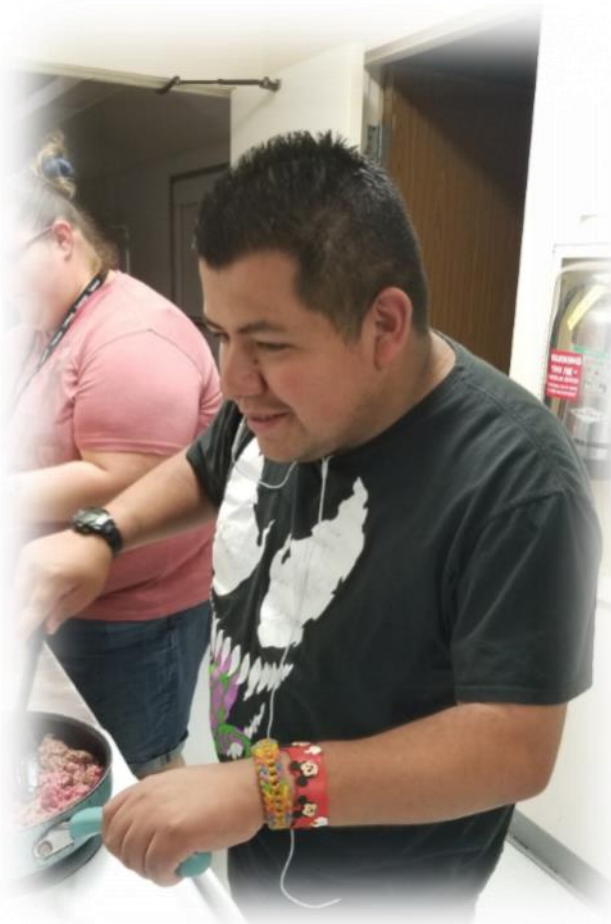


Revenue	Year 16/17	Year 17/18	Year 18/19	Expenses	Year 16/17	Year 17/18	Year 18/19
Service	\$7,283,099	\$7,152,868	\$6,395,399	Salaries/Wages	\$3,949,251	\$4,080,366	\$3,896,185
Grants	\$10,250	\$199,625	\$123,980	Client Wages	\$855,474	\$840,736	\$677,044
Contracts	\$1,155,098	\$980,774	\$957,012	Benefits/Taxes	\$1,533,236	\$1,377,939	\$1,211,464
Public Support		\$17,992	\$16,748	Insurance	\$103,621	\$103,830	\$103,464
				Operating Costs	\$1,316,583	\$2,240,792	\$2,188,324

2018  
2019

# HIGHLIGHTS

## COMMUNITY INTEGRATED SERVICES PROGRAM BEGINS PROVIDING SERVICES IN MAY 2019!



In order to comply with the new HCBS and WIOA requirements which mandate that client services be primarily provided in community environments and not at center-based locations such as Work Training and Adult Developmental Centers, EXCEED has developed the Community Integrated Services program (CIS).

The overall purpose of EXCEED's CIS is to provide person centered services that provide individualized supports to assist individuals to live quality lives as productive and active members of their communities.

Individualized supports involve:

- Participation in meaningful community integrated volunteer-work activities that assist individuals to evaluate their vocational skills and abilities and then develop specific work skills, abilities and interests that may lead to community integrated employment (CIE), additionally these volunteer activities provide an avenue for individuals to contribute their unique gifts and talents to the local community;
- Participation in community activities that assist individuals to expand and deepen relationships within their local community;
- Assistance to obtain community integrated employment (CIE) commensurate with each individual's unique skills and abilities.
- Assistance to maintain employment by ensuring community membership and a strong circle of support outside of work time.

EXCEED's CIS is designed to assist individuals to transition from the WTC's and ADC's into community membership and eventually, CIE when possible. Support will be provided to utilize natural/generic resources in each individual's community.

2018  
2019

# HIGHLIGHTS

## CALIFORNIA DISABILITY SERVICES ASSOCIATION LEGISLATIVE BREAKFAST JANUARY 2019

On January 25, 2019 attendees of the California Disability Services Association Legislative Breakfast were treated to the heartwarming "Paperclip" story of Darren O., by his mother Darlene.

(Darren O., pictured with his parents and Michael Vargas, EXCEED Board Member and Mayor of Perris)



## JOB FAIR APRIL 2019



We held our 2nd Job Fair at our Perris facility in April 2019! EXCEED clients and the general public were able to interact with a number of local employers including: Burlington, Department of Rehabilitation, Petco, Barons Market, Work for Warriors, The City of Perris, EMWD, University of Phoenix, Tension Corp, Help Heal Veterans, Primerica, People Ready, Aerotek and Mt. San Jacinto College.

## SPRING FLING & HARVEST FESTIVAL

The highlight of the year for many EXCEED clients is our annual Spring Fling and Harvest Festivals! Clients and staff are encouraged to invite their families and have a fun time with EXCEED staff and their peers! This years April 26th Spring Fling theme was luau where the clients enjoyed dance lessons and Hawaiian food. This years Harvest Festival theme was "harvest", where everyone enjoyed the annual dance and costume contests!



2018  
2019

# WORK TRAINING CENTERS

## Work Training Centers

The Work Training Centers in Hemet and Perris provide a remunerable work experience for adults with developmental disabilities that wish to develop and maintain vocational, social and behavior skills. Pre-Employment skills training, community volunteer opportunities, interpersonal relationships, attendance & punctuality, work safety, work tolerance and specific job skills training are critical components of the program to prepare clients for work in the most integrated setting possible.



333 CLIENTS  
SERVED AT THE  
HEMET & PERRIS LOCATIONS

\$677,044 PAID IN  
CLIENT WAGES



248 CLIENTS ACHIEVED ONE OR  
MORE OF THEIR GOALS



CARF ACCREDITED  
SINCE 1987

### THANK YOU TO OUR CONTRACT PARTNERS!

- All-Source
- AMA Plastics
- Assemblies Unlimited
- Bradshaw International
- Berlin Packaging
- Britevision
- Charging Innovations
- The City of Hemet
- Contract Labelling Services
- Eastern Municipal Water District
- Family Foods International Inc.
- Go Donut
- Help Heal Veterans
- iHerb
- Integrity Design Group
- Jassu Ltd.
- Microdyn Plastics
- Milgard Windows
- Organic Pastures
- Ouai Fze
- Perris Union High School District
- Rens Enterprise Inc.
- Roll-A-Shade
- Sierra Aluminum
- Slide-A-Shelf
- Strech Plastics
- The Medicine Shoppe
- West Coast Labels
- WBC Group



13 CLIENTS  
TRANSITIONED TO  
SUPPORTED  
EMPLOYMENT



2018  
2019

ADULT DEVELOPMENTAL CENTERS

**Adult Developmental Center**

The Adult Developmental Centers in Perris and Hemet provide basic living skills training, which assists clients in reaching their maximum level of independence, along with access and inclusion in the community. Our curriculum includes self-advocacy, mobility, money management, functional reading, basic academics, pre-work skills, writing, daily living skills and personal growth and development.

88 CLIENTS SERVED AT THE PERRIS & HEMET SITES

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

11,198 HOURS IN COMMUNITY ACTIVITIES



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



2018  
2019

COMMUNITY EMPLOYMENT SERVICES

**Supported Employment**

Provides individual training and a combination of support services in community-based employment. This program enables clients to work independently, achieve and maintain employment in an integrated setting in the business community. Individual Placements (IP's), receive initial support services from an EXCEED Vocational Trainer in areas such as orientation, employer policies, job duties and safety procedures. Clients receive on-going support as needed in order to maintain or enhance employment. Group Placements receive continuous support from an EXCEED on-site supervisor.

**Paid Internship Program**

The Internship Program provides job readiness and on-the-job training through coaching and natural job supports with the ultimate goal of competitive integrated employment using the job skills acquired.

**External Situational Assessment**

Provides an evaluation of a clients functional capacity for community based employment, identifying strengths , barriers and possible on-the-job supports necessary for the client to be successful.

THANK YOU TO OUR  
EMPLOYER PARTNERS!

- Albertson's
- Angel View Thrift Store
- AutoZone
- Clayton-Perris
- Del Taco
- EM Logistics
- Food for Less
- Ghandi Indian Cuisine
- Grocery Outlet
- Help for Future Leaders
- Home Depot
- HomeGoods
- Hometown Buffet
- L.L.L. Reptiles
- Lexus of Riverside
- Lithopass
- Lowe's Regional DC
- Old Traditions Tattoos
- Petco
- Petsmart
- Raising Cane
- Ralphs
- Regal Cinemas
- RivCo Office of Education
- Salvation Army Corps Office
- Schneider Electric
- Smart & Final
- Snackin' Free
- Soboba Country Club
- SoCal Games & Comics
- Sonic Burger
- Taco Bell
- Tech Data
- TJ Maxx
- Valley Wide Recreation
- Walgreens
- Walgreens Regional DC
- Walmart
- Wayfair
- Winchester Dog Grooming
- Vons



AVERAGE LENGTH OF  
EMPLOYMENT  
7.59 YEARS

164 CLIENTS  
WORKING IN THE  
COMMUNITY!

AVERAGE "INDIVIDUAL  
PLACEMENT" (IP) WAGE  
\$14.92



CARF ACCREDITED  
SINCE 1987

149 SITUATIONAL  
ASSESSMENTS  
COMPLETED

12 CLIENTS PARTICIPATED IN  
THE PAID INTERNSHIP  
PROGRAM

**2018  
2019**

**CASA DEL VALLE**

**Casa del Valle**

The Casa del Valle Residential Program provides long-term housing, care and training to adults with developmental disabilities in a 4,400 square foot, 14 bed facility on approximately 0.9 acres. Casa residents enjoy a safe and healthful living environment where they can learn skills to enhance their independence and participate in the normalized living and working patterns of their community.

EXCEED provides homelike residential service and supports that enable each resident to reach their maximum level of independence and integration and enjoy a quality of life based on dignity and respect.

**CASA DEL VALLE IS HOME TO 14 RESIDENTS**



**4253 HOURS SPENT IN COMMUNITY ACTIVITIES!**



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

## **Major Accomplishments**

- We participated in the CDSA Legislative Breakfast and discussed funding issues with 5 members of the legislature
- There were 164 clients in job placements in the community
- The average wage for IP increased to \$14.92, last year it was \$13.52
- Client satisfaction remains high
- An average of 239 (46%) clients in the Work Training Centers increased their production rate each quarter and 248 clients achieved one or more of their goals
- Our buildings are accessible and kept in good repair despite being over nineteen years old
- The results of our outside inspections by funders and regulatory agencies are consistently very good
- 11,198.5 client hours of service, in the ADC programs, were provided in the community.
- We became vendored for new 055 service
- We made changes to the structure of our organizational chart due to the addition of a new program/service

## **Challenges and Expectations Not Met**

- Procuring work for the workshops fell very short of our goal again this year
- Time in paid work in Work Training Centers programs fell short of goal
- Staff retention rate was lower than our goal and we continue to lose key personnel because of inadequate funding and our inability to be competitive with wages
- Our industry was successful in their lobbying efforts to increase funding but not to adequate levels and there were no increases for the workshop programs

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

- Continue to inform legislators of the value of productivity-based compensation (sub minimum wage) for our clients and advocate for additional rate increases
- Increase the number of people in Supported Employment placement and client service hours in the community/integrated work settings. (ADC, WTC & CIS)
- Increase our revenue and increase the staff and client wages
- Have satisfied clients, parents/care providers, funders, employers and customers
- Revenue to exceed expenses at year end
- Develop at least 2 more new service programs
- Open a second thrift store and relocate the store in Perris