

# The Phoenix Residence

## *Annual Report 2017*



## *A Home of Your Own*

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# Message from the President

## *A Home of Your Own*

A home of your own seemed like a pie-in-the-sky goal for a person with mental or physical disabilities a decade or two ago. However, with the landmark case *Olmstead v. LC and EW*, filed in 1995 and settled in 1999, mandating that individuals with mental and/or physical disabilities be served in the most integrated community setting, the reality of their own home seemed a bit more realistic. Here in Minnesota, refocusing on *Olmstead* and its principles due to the *Jensen versus DHS* lawsuit, and a shift in policy regarding how funding for housing is accessed, a home of your own is a real option for people with disabilities—and it is one of the next big initiatives for The Phoenix Residence (PRI).

As we look to the future, we have identified three Strategic Initiatives: Person-Centered Services, Workforce Solutions, and Business Modeling for a Sustainable Future. We will elaborate more on our Strategic Plan later in this publication.



A major priority for Phoenix is making affordable housing available to individuals with disabilities and individuals experiencing homelessness. We see a focus on housing as the avenue to help people live a life of choice with as much independence as possible. We are working with Phoenix Service Corporation (PSC), our sister corporation, to expand housing to people who have a desire to live in their own place.

We are delighted to report that Phoenix is serving several individuals in their own homes with a lease in their name! PRI and PSC are enrolled with the Department of Human Services and under contract to provide Housing Support Services as a Group and/or Community in four counties, and we look to continue expanding as opportunities are presented.

Throughout the next two pages are success stories of individuals now living in their own home or 4-bed home with others as they work toward pursuing their dreams.

In order to make housing available to individuals with low income, little or no credit, or rental history, we must partner with landlords who are willing to rent to people who might not otherwise qualify for a traditional rental unit. In addition to housing, we need employees willing to go into people's homes to support them. All providers are facing a struggle here in Minnesota and throughout the country, due to low unemployment rates and an unprecedented workforce shortage that makes this work even more challenging. When we see the difference that it makes in the lives of the people we support, it makes all of the monumental hurdles worth every effort!



Darlene Scott  
President & CEO  
The Phoenix Residence





# Individual Stories

## A Home of Your Own

### Richard Howell

I would like to introduce you to Richard. Life wasn't so generous to him in his early days. Not only did he suffer a heart attack, but he endured a grueling divorce. Subsequently, Richard became homeless after this health crisis.

Before coming to Phoenix, Richard described his life as "cold." He was living in his car, which occasionally broke down, therefore causing him to miss medical appointments and have many encounters with law enforcement. On top of that, his health wasn't in the greatest shape either. "My feet were so swollen that they (the doctors) were getting ready to amputate them."

It was then, that Richard was at his breaking point. He couldn't live like this any longer! He reached out for assistance, but it wasn't that easy. His first provider wasn't a good match—he recalled that people there were on drugs and the program just wasn't working for him.

Through the help of his case manager, he found Phoenix! And he's never looked back since! Richard came to Phoenix in March 2018 and moved into his own apartment. This apartment, more so than anything else, provided him stability to *get his life back on track*.

He's been able to set-up and follow through with appointments, and get his health back under control through healthy eating and consistent diabetic testing. "Once I got here and I got my diabetes meter ... a lot of my medical stuff is starting to change. My health is better, my body feels better."

Richard only hopes to move forward from here. His goal is to build up his rental history, eventually moving into a larger apartment without the support of the programs.

*"I have had the most help I've ever received over the last five years ... I wouldn't be here without you."*

*Richard Howell  
Individual living in his own home*

### Gary Young

Gary Young, another individual we serve through the program, has a similar life story. Before he came to Phoenix, he had been homeless for 3-4 years, riding the train, sleeping in parks or the skyways. "Life was hard before. I was just trying to find help."

Then, in July 2018, an outreach worker helped him find Phoenix. And the rest is history. Now that he has his life back on track, Gary plans to keep moving in the right direction. He recently started a new job and hopes to get a car in the near future.

"This program is great. I feel like I'm getting on track now," Young said. "I'm living day to day, living life. Things are going really good so far."



# Individual Stories

## A Home of Your Own

### Julie Stapf

Not only are we making housing accessible for those in our independent apartments, we're also making dreams come true in our 4-bedroom community residential homes. Meet Julie who lives at Eric's House. Julie came to Phoenix in March 2014 from a previous provider.



Before The Phoenix Residence, Julie lived in a place where she felt very lonely and ignored. "I used to live in a house with other individuals who were not friendly," said Stapf. "I used to just sit by myself and sometimes staff didn't even check on me. I was very scared and didn't really go places."

And so Eric's House was born. We designed the home to meet the accessibility needs of the women who planned to live there with Julie's help. We filled the home with all-female staff and roommates. The tracking in the home helps transport the individuals around easier, the wide hallways and rooms let them navigate the home on their own, and the lift in the bathroom helps the women access the tub easier.



Not only has Julie's life improved physically, but also emotionally. "The Phoenix Residence has given me a family, an opportunity to connect with the outside world," said Stapf. "Most of all, they made me feel safe. I'm no longer scared like before."

Since moving into Eric's House, Julie has retired from her job and staff help her choose activities to participate in during the week. She's also purchased a computer and an iPad, which she uses for her games. "Now, I have my own cell phone, which is like a dream come true."



And Julie has big plans for the future. She is thinking about the possibility of marrying one day. She also wants to travel to all 50 states someday, and thanks to her program manager, she can check Wisconsin and South Dakota off the list. For now, she's enjoying life at Eric's House and uses her Gait Walker three times a week for exercising, hoping to gain more strength in her legs.

"I love the Phoenix Residence and I love my home," Stapf concluded. "It's like a family here at Eric's House. We listen to good music and share good laughs. We play games and [sit] outside on the patio and barbecue. Most importantly, I get to do what I want. It's always my choice."

# Strategic Updates

## 2017: A Year of Reflection and Development for The Phoenix Residence

In 2017, we reviewed our Strategic Plan and developed new goals based on the feedback we received through a series of retreats. We identified early in the process that we wanted to focus on three core areas, so we utilized a group of our leadership team, board members, and other partners to help us develop a path in achieving success in these areas. For each of our goals, we developed a workgroup charged with examining the challenges we face in this area and leading the changes needed to enhance organizational success. The workgroups and subsequent goals include:

### **Workforce Development:**

Workforce challenges affect all parts of our organization and services on a daily basis. Phoenix is dedicated to sustaining and expanding its workforce through creative compensation, retention, and recruitment strategies. The group is identifying challenges in our current process and working to address those as well as develop new ideas on how to target recruitment moving forward. In addition, this group will look for ways to provide additional career advancement opportunities and how we can utilize staff members' unique talents here at Phoenix.



### **Development of Person-Centered Services**

We have been working on this initiative for a number of years, but we really honed in on it this past year. In order for us to be able to serve people in the best manner possible, we need to be able to understand the core values of Person-Centered Care and communicate that through the entire organization. We also recognize our changing workforce places a premium on our ability to teach/train this concept in a manner where people can apply it to their work quickly. This workgroup is developing a common definition of what Person Centered is and how we can make that definition an everyday part of the work at Phoenix. The workgroup is also focusing on integrating this further into our culture and identifying barriers to this approach.

### **Sustainable Future:**

Despite the challenges we face, Phoenix is continually looking for ways to further meet the needs of our community. This workgroup is examining Phoenix's future and where we should go from here. Discussions have evolved around expanding our independent housing program, exploring the option of supporting people with autism as well as other services we could market.



# Technology at Phoenix

At the head of all three of these initiatives, technology will pave the way in supporting people to live their best lives possible. It will give them access and the ability to interact with their community like we do every day. Furthermore, it will be a vital resource in our ability to effectively provide services in the most efficient and cost-effective manner as possible.



We are continuing to explore Smart Home technology and the role Alexa can play in our homes. Individuals are now able access their home in new ways—by not having to rely on staff to help them as they've done in the past. Individuals are also using the internet and iPads for Skype more often in several of our homes.

Additionally, we are exploring alternative ways to give medications. With medication-passing devices, individuals have more independence in taking their own meds, while still experiencing the accuracy and accessibility they've always had. While we have yet to implement this organization-wide, we are exploring the possibilities.

We have been ambitious in piloting potential benefits technology can have in our spaces. As we move forward, we'll continue to keep that conversation at the forefront as we problem-solve challenges and help people realize their best life.

# Fundraisers

## 2018 Golf Tournament is a Big Success!

The Phoenix Residence held its annual Russ Douglas Phoenix Golf Classic on June 11, 2018 at the River Oaks Golf Course in Cottage Grove. This year marked the 19th year of our annual tournament.

A BIG thank you to everyone who made the 2018 Russ Douglas Phoenix Golf Classic such a huge success! Amidst the cloudy skies, our 87 golfers only ran into a few short sprinkles throughout the day. After a busy day of golfing, the golfers outbid each other in this year's Silent Auction and enjoyed themselves over dinner and a short program.

Thank you to all major sponsors, golfers, volunteers, family members, staff, and those who donated to the Silent Auction and Wall-of-Wine for all of your support of our golf tournament and the organization! Also thank you to River Oaks Golf Course for hosting us once again.

*Thank you to all our donors and sponsors!*



### Major Sponsors

#### **Platinum Level**

CBS Construction

#### **Gold Level**

Family of Paul Dwyer

Geritom Medical, Inc.

John's ProCare

Lynn and Dave Myhr

NFP Corporate Services

Eric and Mary Claire Schultz

#### **Silver Level**

Carlson Advisors

John Kuhrmeyer/The Canopy Group

McKesson Medical

Old National Bank

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The Banks Family

CBL Floors

CobornsDelivers

Cummings Mobility

Darlene Scott

K & L Building and Remodeling

Lunds & Byerlys

Mark and Judy McClellan

Minnesota Coaches, Inc.

Steve and Lou Pfeiffer





# Fundraisers

Russ Douglas Phoenix Golf Classic

*You Helped Us Raise \$37,350*



**Save the Date for Next Year!**

Russ Douglas Phoenix  
Golf Classic 2019

**June 10, 2019**

***With the Help of...***

**21 Sponsors**

**21  
Volunteers**

**74 Silent  
Auction  
Donations**



*Thank you to all our sponsors!*

*Thank you to Kate Dwyer for  
sharing your family's story.*



# Fundraisers

## Gerten's Flowers Bloom at Phoenix

Every year, we soar to the sky with the Gerten's Spring Plant Sale—and this year was no exception! This was our fifth year hosting the Gerten's Plant Sale, and each year we receive more and more exceptional feedback from our customers. Thank you to everyone who purchased flowers during our annual Gerten's Fundraiser! This year, we raised **over \$4,400**.

*This fundraiser wouldn't be possible without the support of our Phoenix network! We thank each and every one of you.*



### Shout Out!

Special recognition goes out our English House. We started this fundraiser in 2013 as a trial run with our English House—and ever since then, they've hit it out of the ballpark. Their flower sales continue to rise and they are still a drop-off host site every year. Thank you to everyone who supported and helped the English House with this fundraiser!



### Straight from our Supporters

*"Every year we look forward to receiving the email in early March from Phoenix with their Gerten's Plant Sale order form! SPRING IS COMING! The order process is easy, the pickup/delivery is GREAT, and the plants are BEAUTIFUL! I love this fundraiser and tell my friends and family each year where I get the majority of my beautiful plants for our yard. Thank you Phoenix Residence for your fundraiser!"*

*Lynne and Kevin Megan, TSE, Inc.*

*"National Handicap Housing for the past two years have gotten all its summer flowers from the Phoenix Plant Sale. The planters are fabulous. We buy around 50 planters that get distributed to our 13 properties. Every year our residents comment how beautiful they are and how they look forward to them coming. The whole process of ordering and delivering is so easy. Thank you Phoenix for making this so easy."*

*Mike Semsch, National Handicap Housing Institute, Inc.*

# 2017 Donations

*A Heartfelt Thank You to All Our 2017 Donors!*

## \$5,000

CBS Construction  
Geraldine Hess

## \$2,500-\$4,999

Betsy Sagnes  
David and Lynn Myhr  
Eric and Mary Claire Schultz  
Tom and Mary Deeney  
Veronica Johanneck

## \$1,000-\$2,499

Carlson Advisors  
CBL Floors  
Chris and Duane Berg  
Cummings Mobility  
Darlene Scott  
Derrick Banks  
Geritom Medical, Inc.  
Jeff Schmitt  
John Kuhrmeyer

## \$1,000-\$2,499

Kurt and Gina Kastel  
McKesson Medical  
Minnesota Coaches, Inc.  
New Park Lions Club, Inc.  
Paul Severson  
South Robert Street Business  
Association  
Steve and Lou Pfeiffer

## \$500-\$999

Jamie Grupe  
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St. Paul Firefighters Local 21  
Ultimate Fleet Repair

## \$100-\$499

Alan Berner  
Alex Lape  
American Family Insurance -  
Darin Husaby  
Becky Butler  
Bob Eishen  
Bonnie Sykora  
Brown & Brown Insurance  
Bruce Singer  
Business Telephone Products  
Cannon Equipment Company  
Canopy Financial Group  
Christensen Group  
Dan Lippert

## \$100-\$499

David Douglas  
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DeWitt Mackall Crounse &  
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Diane Kubal  
Diane Schreier  
Donna and David Patrick Madera  
Doug Hemer  
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Jeff Crawford  
Jeff Points  
Jeffrey Berg  
Jennifer King-Ellis  
John's ProCare  
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Julie Perlinger  
Karen Olson  
Katherine Dwyer  
Kirsten and Eric Gregerson  
Larry Quist  
Leeann Leitch



*Donations received from  
January 1 – December 31, 2017.*

*The Phoenix Residence sincerely apologies if anyone  
was unintentionally omitted from the donation list.  
Thank you for your generous donation!*





# 2017 Donations

*A Heartfelt Thank You to All Our 2017 Donors!*

## \$100-\$499

Leigh and Grant Barrette  
Linda Nordstrom  
Liz McCambridge  
Louise Davidson  
Mallory Hess  
Mark and Jacquelyn Braun  
Mark and Judy McClellan  
Mark and Kim Calhoun  
Mark Johnson  
Mary Ann Corbey  
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Mary Vilmur  
Matthew Cords  
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Pat Burns  
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Reliable Medical  
Richard Ivance, M.D.  
Rose Joarnt  
Rosemary Leopold  
Roxanne Kasal  
Selective Insurance  
Sherry Gray  
Theresa Oberle

## \$100-\$499

Thomas Cherry  
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Vadnais Heights Lions Club  
Western National Mutual Insurance Company

## Up to \$99

Andrew Nichols  
Audrey Dehn  
Barbara Dwyer  
Barbara Husaby  
Bill and Sandy Husaby  
Brenda Harvey  
Bruce and Karen Dahlman  
Carl Kuhrmeyer  
Cheryl and Steve Moore  
Dale Smith  
Dan and Deanna Roering  
Dan Larson  
Dave and Roxanne Tueffel  
Diane Berg  
Ellen Duncanson  
Emily Severson and Jason Kohout  
Gail Hassler  
Geoff and Kaylene Roering  
Helen and Brian Blaney  
Jackie Larson  
Jamie Berner  
Jenny Buchanan  
Jo and Lucius Foster  
Joanne and Craig Swanson  
Joe and Carrie Nordstrom

## Up to \$99

Judy Collins  
Kathleen Trout  
Kathryn Howell  
Kaylee Larson  
Kim Human  
Mark Hines  
Matt and Jenna Severson  
Melissa Luck  
NFP Corporate Services  
Rachel Koenigs  
Randy and Paulene Roering  
Richard and Nancy Bulthuis  
Richard Wilkie  
Rick Borchardt  
Russell and Jana Wegwerth  
Samantha Finegold  
Scott Clements  
Sue and Alan Shuler  
Tom and Cheryl Berner  
Tom Severson  
Travis Kefer and Nicole Mellum  
Wendy Price

## Grants

Hubbard Broadcasting Foundation

*The Phoenix Residence  
sincerely apologizes if  
anyone was unintentionally  
omitted from the donation  
list. Thank you for your  
generous donation!*

*Donations received from  
January 1 – December 31, 2017.*



# 2017 Donations

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## In-Kind Donations

A. Johnson & Son's  
Abdallah Candies  
Anoka County Parks & Recreation  
Barb Husaby  
Bell Bank  
Bill and Sandy Husaby  
Bluestone  
Blvd. Bar and Grill - West St. Paul  
Bowlero Lakeville  
Brave New Workshop  
Breadsmith  
Buca di Beppo  
Café Latte  
Cannon River Winery  
Canterbury Park  
Chanhassen Dinner Theatre  
Cheers Pablo  
City of Saint Paul Police Station  
Coborn's Delivers  
Color Me Mine  
ComedySportz  
Comfort Suites  
Commanding Edge  
Commercial Steam Clean  
Culvers

DeGidio's  
Festival Foods  
Fireside Lounge  
Gerry's Fire & Safety  
Gerten's  
Grand Casino Hinckley/Mille Lacs  
Grandma's Restaurant Company  
Great Lakes Aquarium  
Great Moon Buffet  
Great Water Brewing Company  
Guthrie Theater  
Holiday Gas Station  
Innovative Office Solutions  
Joe Mauer Donations  
John's ProCare  
Joke Joint  
Joseph's Grill - West St. Paul  
Kwik Trip  
Lunds & Byerlys  
Mall of America  
Mama's on Rice Street  
Mancini's  
Maria Duwenhoegger  
Mark Braun  
Massage Envy - Highland Park  
Metro Sales  
Minneapolis Institute of Art



Minnesota Historical Society  
Minnesota Landscape Arboretum  
Minnesota Lynx  
Minnesota Orchestra  
Minnesota State Fair  
Minnesota Twins  
Minnesota Vikings  
Mississippi Market  
Mystic Lake Casino  
O'Gara's Bar and Grill  
Old Log Theatre  
Panera Bread  
Park Square Theater  
Pearson Candy  
P.F. Chang's  
Plaza TV & Appliances

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January 1 – December 31, 2017.*

# 2017 Donations

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## In-Kind Donations

Prairie's Edge Casino  
Punch Pizza  
Reliable Medical  
River Oaks Golf Course  
Rocco Altobelli  
Ruttger's Bay Lake Lodge  
SevenClans Casino  
Southview Country Club  
St. Paul Harley-Davidson  
St. Paul Saints  
Stagecoach Brewing Company  
Stages Theatre Company  
Steve Pfeiffer  
Stevie Ray's  
SuperAmerica  
Surly Brewery  
Tav on the Ave  
The Commodore  
Total Wine & More  
Trader Joe's - St. Paul  
Valleyfair  
Verizon  
Vertical Endeavors  
Walt Disney World  
Wheel of Fortune  
Wild Mountain  
Wilson Tool  
Wuollet Bakery



## Memorials

### In Memory of Mike Houle

Pat Callinan

### In Memory of Eric Nordstrom

Linda Nordstrom

Mark Hines

### In Memory of Greg Robeck

Pat Callinan

### In Memory of Daniel Ehlenz

Judy Collins

### In Memory of Mary Claire Schmitt

Jeff Schmitt

### In Memory of Mike Fournelle

Cannon Equipment Company

Mary Thirsten

Pat Callinan

### In Memory of Suzy Gray

Helen and Brian Blaney

Mary Thirsten

### In Memory of Russ Douglas

Dave Douglas

### In Memory of Don Bond

Pat Callinan

### In Memory of Karl Schneider

Janice Schneider

*Donations received from  
January 1 – December 31, 2017.*





# Financials

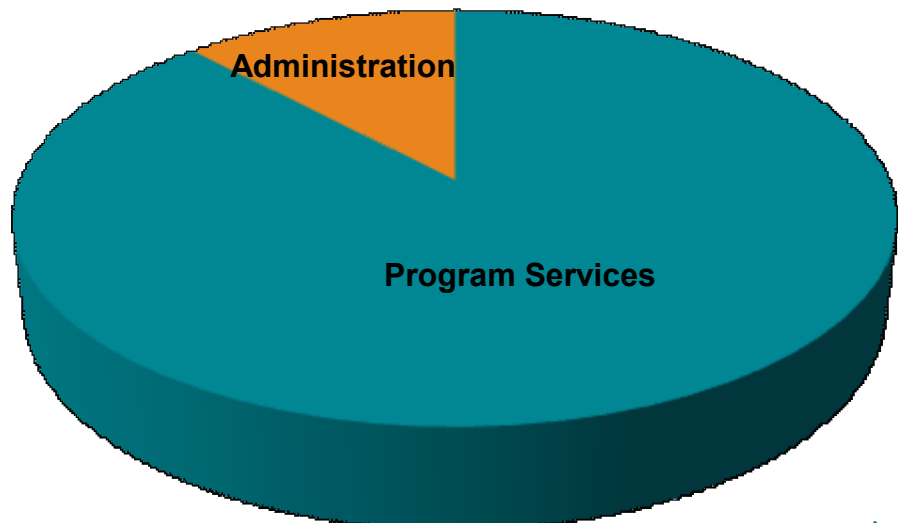
## Statement of Financial Position

## Statement of Activities

<i>Assets</i>	<i>2017</i>	<i>2016</i>	<i>Revenue &amp; Support</i>	<i>2017</i>	<i>2016</i>
Cash	\$715,496	\$616,854	Program Services	\$10,536,789	\$10,562,556
Accounts Receivable	\$899,301	\$942,896	Donations & Special Events	\$121,041	\$126,412
Property & Equipment	\$6,883,541	\$6,607,777	Interest & Other	\$41,551	\$35,599
Other	\$32,812	\$31,000	<b>Total Revenue</b>	<b>\$10,699,381</b>	<b>\$10,724,567</b>
<b>Total Assets</b>	<b>\$8,531,150</b>	<b>\$8,198,527</b>			
			<i>Expenses</i>		
<i>Liabilities and Net Assets</i>			Program Services	\$9,336,712	\$9,043,747
Current Liabilities	\$577,520	\$587,600	Administrative Expense	\$1,193,668	\$1,153,779
Long-Term Debt	\$396,363	\$191,461	Fundraising	\$31,199	\$26,779
<b>Total Liabilities</b>	<b>\$973,883</b>	<b>\$779,061</b>	<b>Total Expenses</b>	<b>\$10,561,579</b>	<b>\$10,224,305</b>
			<b>Change in Net Assets</b>	<b>\$137,802</b>	<b>\$500,262</b>
<i>Net Assets</i>					
Unrestricted	\$7,523,381	\$7,084,908			
Temporarily Restricted	\$33,886	\$334,558			
<b>Total Liabilities and Net Assets</b>	<b>\$8,531,150</b>	<b>\$8,198,527</b>			

## 2017 Expenses

88% Program Services  
12% Administration



# Board of Directors

*Thank you to all our board members for your time  
and commitment to The Phoenix Residence!*

Steve Pfeiffer  
Chairman

Jenny Buchanan  
Director

Richard Ivance, M.D.  
Vice Chairman

Garrett Colao  
Director

Jim Hughes  
Treasurer

Julie Nagorski  
Director

Jean Schmidt  
Secretary

Jamie Grupe  
Director

Derrick Banks  
Director

Jeffrey Points  
Director

Kirsten Gregerson  
Director

Darlene Scott  
President/CEO

Eric Schultz  
Director

## Contact Us!

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