

Annual Report 2013

My Life, My Way

Committed to developing person-centered quality living experiences for individuals with disabilities



The
Phoenix
Residence, Inc.



ANNUAL REPORT 2013

president's message: My Life, My Way

Life has a way of opening our eyes to what is important. We need to take the time to look. For me, the eye opener was a near fatal car accident resulting in life-long health and physical challenges for my mother and finding a new way of life for my family.

The word disability became real to me; it would shape my view of the world and the people in it forever. I had one wish – it was for my mother and my family to live a normal life, like other families.

It is that desire driving what we do at The Phoenix Residence and Phoenix Service Corporation; helping people to live *their* life the way they aspire.

Many believe it is impossible to live a life the way you want because of the environment where you live. While it may be true, some providers do allow labels to dictate how supports and services are implemented within their programs.

Choice in everyday decisions about your life; a civil right!

Phoenix subscribes to a different point of view. Meaning where a person lives whether in an *Intermediate Care Facility, Adult Foster Care home, or home of their own* must not determine the life they live or their life experiences. As a provider supporting individuals with disabilities, it is our attitude about service delivery and the barriers we allow them to create that pose the problem.

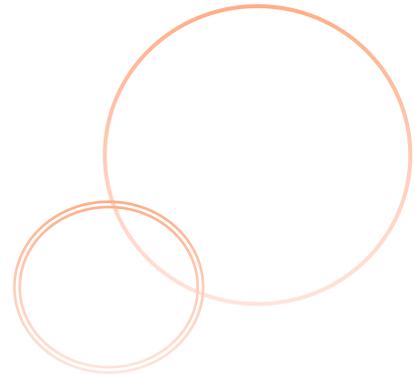
People *must* have a choice in their everyday decisions; including where they live and with whom. It is a civil right! I react negatively to setting limits on individual choices – I see it as an infringement on human rights.

Over the last decade, Phoenix has attempted to break down some of the barriers created by the regulations in place to protect people but have the unintended consequence of stifling individuals from living a life of their choice. In this report, we will share with you some of the innovative ways Phoenix is meeting people where they are and helping them to get where they want to go.

Eric's House is a new program Phoenix developed for four women who are in the driver's seat of their lives; despite a moratorium on Adult Foster Care services in Minnesota. This home was developed because it was the choice of the individuals and their families. Eric's House is named in honor of Eric Schultz, one of the founding members of The Phoenix Residence board of directors.

We are proud to have been selected by Washington County and to help the individuals live a life their way, in their home. Thank you for helping us to help others with "My Life, My Way."

Darlene Scott
President/CEO



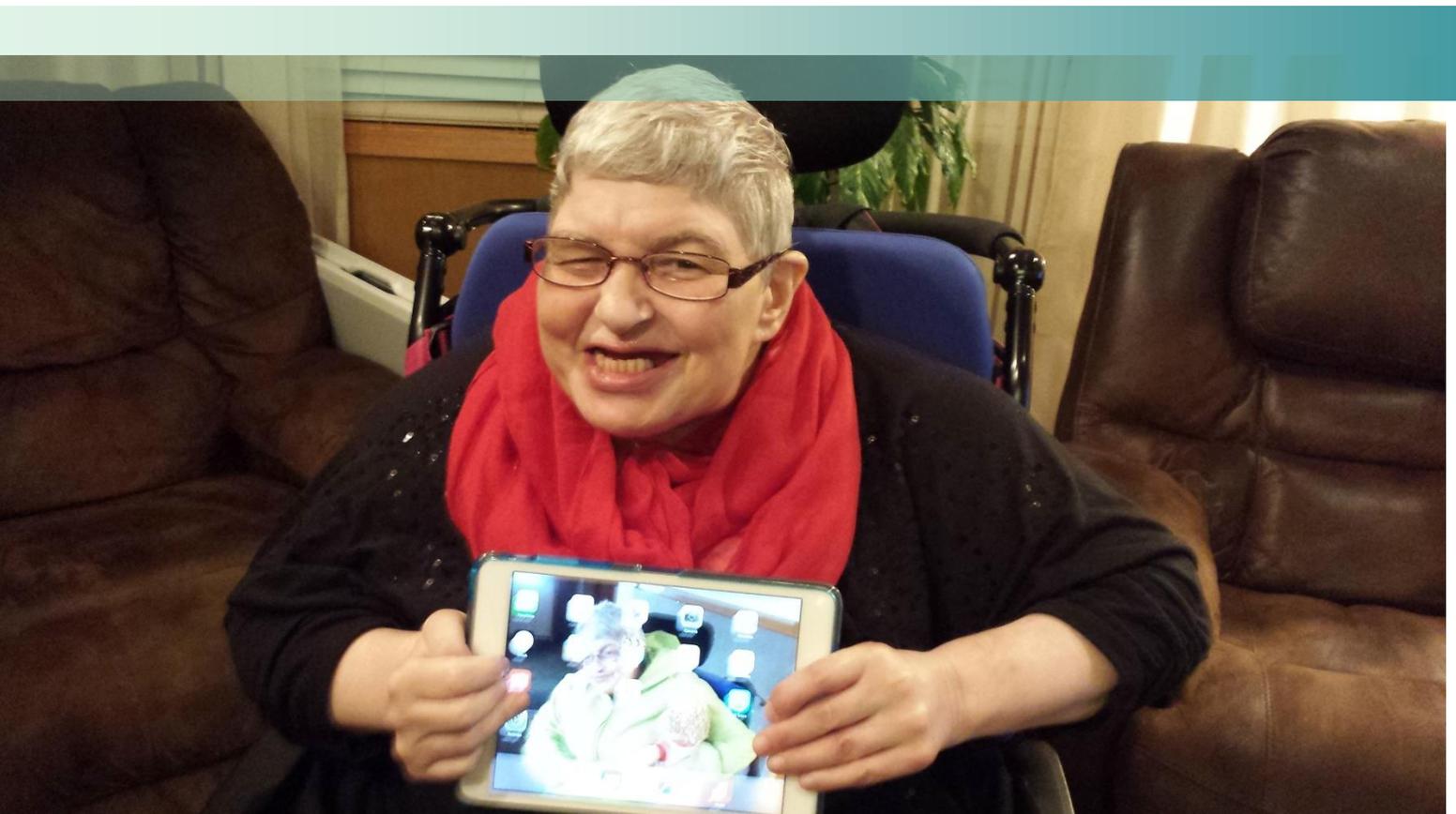
technology

Are you upgrading your computer or no longer using your tablet? Is your employer enhancing technology throughout your company? Consider donating it to The Phoenix Residence.

As a partner of the National Cristina Foundation, The Phoenix Residence has the opportunity to receive gently used technology and hardware such as tablets (Apple iPad) and digital cameras. The National Cristina Foundation (NCF) is a nonprofit organization who promotes the notion technology resources can be given a second productive life; helping many along the way. NCF has placed over 400,000 items in the hands of non-profits.

It is our job to provide the best possible opportunities for those we serve – using technology can help us achieve this goal. Mary Lippert uses her iPad, to communicate via Facetime with her parents in a long-term care facility. Her iPad has provided possibilities not previously available – truly giving her the opportunity to live her life, her way by staying connected with family and friends. To view a list of our current needs, visit our website www.phoenixresidence.org and click the Give tab.

Mary Lippert uses her iPad, to communicate via Facetime with her parents in long term care. Her iPad has provided possibilities not previously available – truly giving her the opportunity to live her life, her way.



fundraising

GERTENS

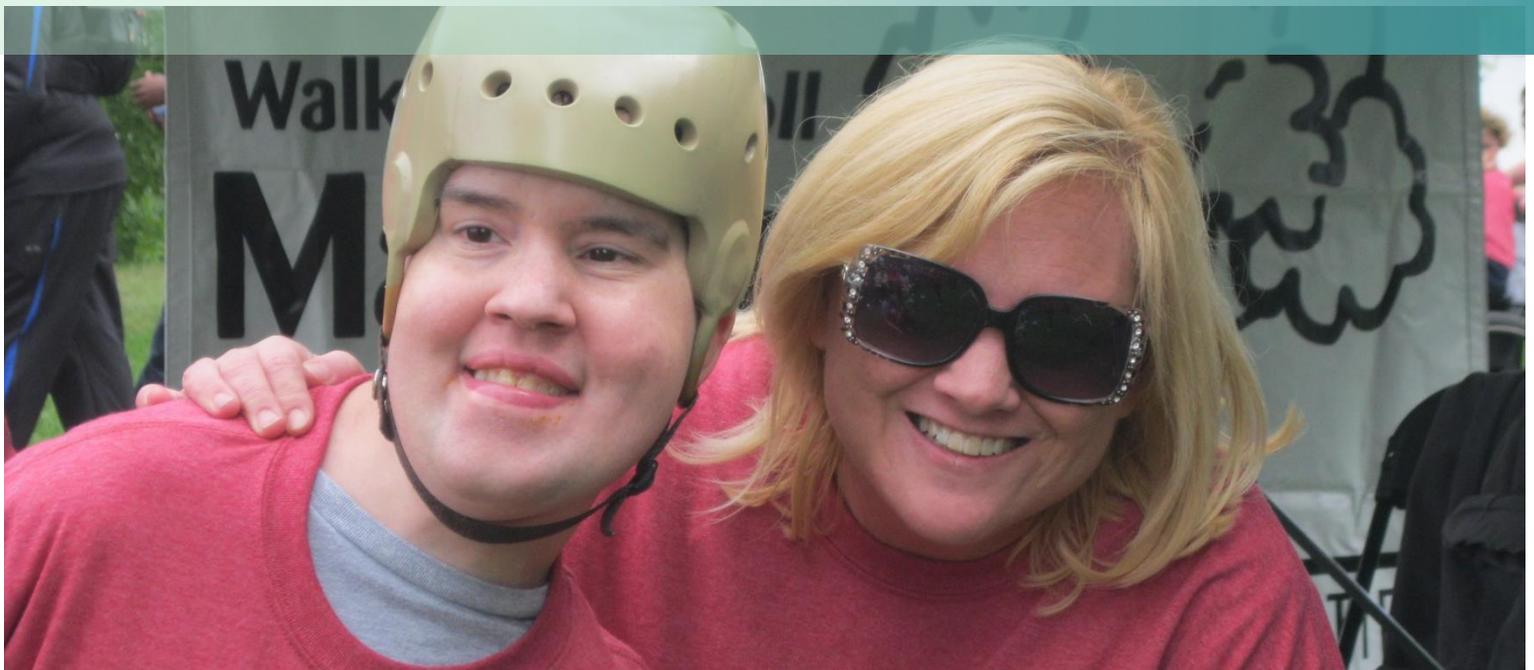
This past year, The Phoenix Residence offered a fundraiser for Gertens flowers. A variety of items were available for purchase – beautiful hanging baskets, individual annuals, and perennials. It was a great way to get wonderful plants while supporting a wonderful cause. Each house kept all proceeds from the fundraiser. For example, English House used their funds for art classes and to purchase musical instruments for music therapy.

RUSS DOUGLAS PHOENIX GOLF CLASSIC

The Russ Douglas Golf Event was again a huge success. The weather was perfect with 88 golfers joining us for a day of fun and golf. All proceeds from the 2013 golf event went towards program expansion, including Eric's House. Eric's House is an example of how four women are truly living the way they choose.

MADE IN THE SHADE

The Phoenix Residence participated in Made in the Shade, held at Lake Calhoun in Minneapolis. Made in the Shade is a non-competitive walk, run, roll event to raise funds for non-profit agencies serving people with disabilities; with over 10 agencies participating. Each Phoenix house was asked to select a goal, whether it was music therapy, taking a trip, or purchasing new technology. Janet Court's goal was to raise funds for the continuation of music therapy.



legislative

ADVOCACY

“The 5% Campaign”, launched in 2013, is a nonpartisan coalition of Minnesotans working together to secure legislators support for a 5% rate increase for Home and Community Based Services (HCBS).

The year 2013 marked the fifth consecutive year the services for people with disabilities did not receive a rate increase. These critical services and supports allow people to be more independent by providing staffing and transportation promoting active living in the community.

The campaign was a success; passing the full 5% during the 2013/2014 session. The 5% Campaign was a move in the right direction however we need to continue the momentum and contact legislatures about supporting HCBS in the years to come.

These critical supports allow people to be more independent by providing staffing, transportation, and promoting active living in communities

245D

The Minnesota Department of Human Services spearheaded system changes in response to correction orders from the Centers for Medicare & Medicaid Services (CMS) to improve health and independence of the people we serve and to promote person-centered planning principles in the development of programs and supports.

The system changes are quite extensive and require Phoenix to make changes to policies and practices to meet the expectations of the new regulations. Individual, family, and team involvement is more important than ever in helping service recipients to develop their Coordinated Services & Support plan. This plan is the vehicle that puts the individual in the driver’s seat.



grants

HUBBARD BROADCASTING GRANT

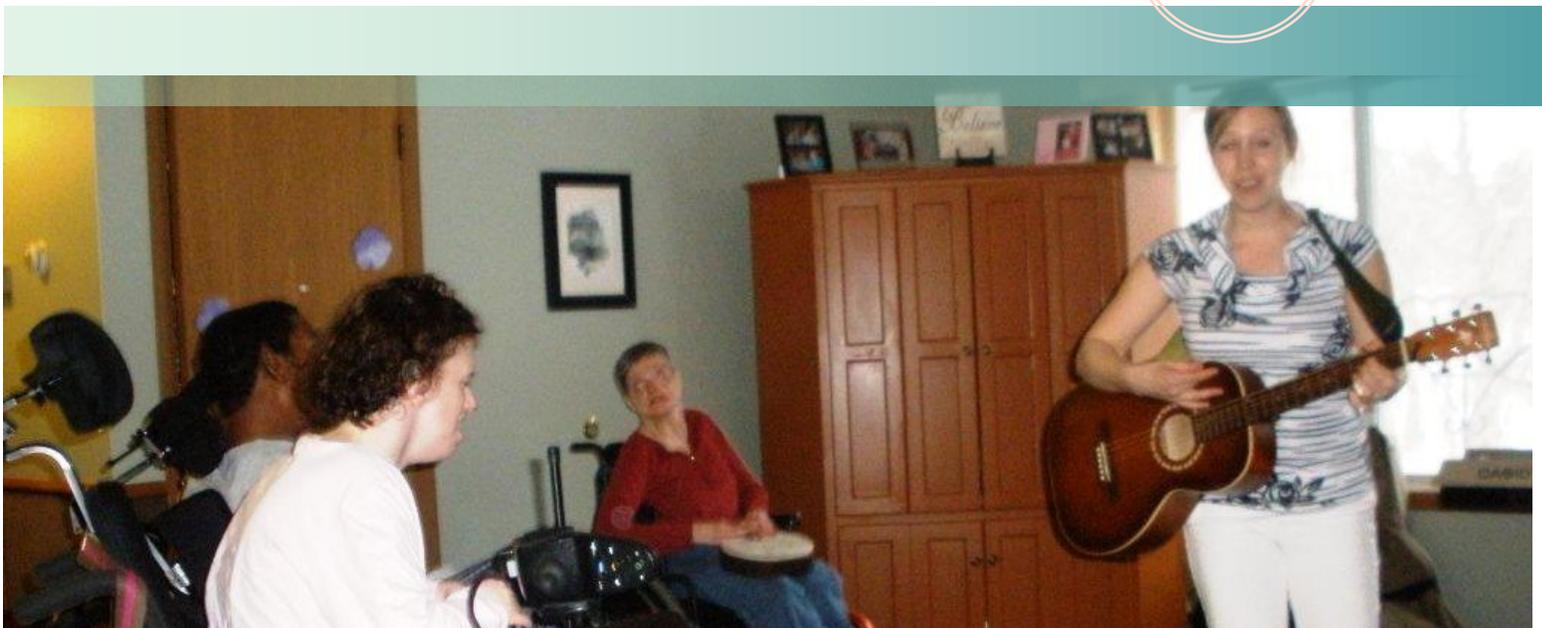
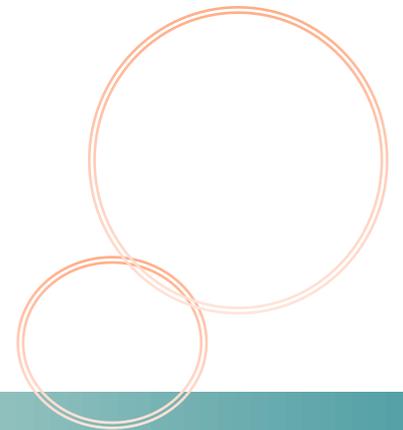
The Phoenix Residence was recently awarded a grant from the Hubbard Broadcasting Foundation. The funds received will be used for the continuation of music therapy at English, Centerville, and Janet Court.

Music therapy is a service enjoyed by individuals, but not funded through our operating budgets. The community sites which offer music therapy typically fund it from money raised from fundraisers like Made in the Shade and Gerten's.

Music therapy has many benefits to a wide range of individuals; specifically adults with physical and development disabilities. During a group music therapy session, the music acts as a co-therapist stimulating social interactions between participants, creating rhythm and structure for movement, singing and speech, and stimulating their cognition.

A sincere thank you to Hubbard Broadcasting Foundation for the grant and the ability to continue music therapy!

***Music therapy is a favorite
and requested by many,
hence giving individuals
the opportunity to live their
life, their way.***



welcome jenny buchanan

PRI BOARD MEMBER

The Phoenix Residence would like to welcome Jenny Buchanan as the newest member of the Board of Directors. Jenny is certainly not new to Phoenix as her son Andy has been living at Newport House for over seven years.

In 2007, Jenny was experiencing some health issues making it more difficult to move Andy, who was an adult at the age of 21. After discussing her concerns at a routine doctor visit, Andy's doctor had recommended the option of a group home.

Jenny completed her due diligence, started to research group homes and found The Phoenix Residence. She then took Andy to tour the Newport House and was certain she had found his new home. During his initial visit, he played with puzzles, met the staff, and toured his soon-to-be room. Andy has lived at Newport House ever since.

*Andy lives a life his way –
participating in the
activities he enjoys.*

Jenny and the rest of her family are very happy with the care he receives. The Newport staff treats Andy as an individual; he gets his hair cut at the place of his choice, picks out his own clothing, and shops at the stores of his liking. The programs and services offered are truly centered on Andy and the others who live at Newport. Throughout the years living at Phoenix Residence, Andy has adjusted well and has developed a sense of independence.

We are excited to have Jenny as a member of the Board, as her insight and expertise are invaluable. Jenny is recently retired and currently lives in Lakeland, Minnesota with her husband John and winters in Florida. She has two stepchildren and six grandchildren.



eric's house

The Phoenix Residence is happy to announce the opening of our 19th home, *Eric's House*. Eric's officially opened on March 5, 2014 and is named in honor of Eric Schultz, a founding board member since 1977. Phoenix Residence was selected by Washington County in response through an RFP process.

Eric's House is certainly unique in many ways. The house, only staffed and occupied by women, was built to meet the needs of the individuals with the understanding of how they would like to access *their* home. Technology has been integrated throughout the house and boasts many accessible features such as a walk-in whirlpool tub, a low profile shower door, adjustable countertops in the bathroom, and a ceiling lift system in two bedrooms and the living area.

The many accessible features in Eric's House have enabled everyone to be in the driver's seat of their own lives; promoting independence.

An induction cooktop was included in the kitchen, providing a safe cooking experience. The dining room includes a height-adjustable table along with chairs complete with in-line casters. Automatic door openers have been added to several doors allowing for individuals to move freely throughout the house without caregiver assistance. The many accessible features in Eric's House have enabled everyone to be in the driver's seat of their own lives; promoting independence.

Many generous people and companies helped make Eric's House a reality – a big thank you to Lowe's Home Improvement West St. Paul, Warners' Stellian, K & L Building and Remodeling, CBL Flooring, and the South Robert Street Business Association

A special thank you to Lynn and Dave Myhr for providing many of the special touches, furnishings, and décor – truly making Eric's House a home.



hello and goodbye

LEONARD OBST

Leonard, who recently moved into the Carver House, is a very pleasant older gentleman, previously living in Sauk Centre. His sister, who resides in the Twin Cities, is excited he is living closer and looks forward to frequent visits.

His interest and hobbies include horses and trains – be sure to stop in and see his train collection. Leonard is currently retire and looking to attend a day program for seniors.

LINDA THOMAS

Welcome Linda to the Caswell House! Linda comes to Phoenix from Mora, Minnesota where she was recently living with her mother. During the day, she attends Northeast Seniors, volunteers at a long-term care facility, and is very involved with her church. Linda also enjoys writing letters to pen pals, friends, and family all over the country.

KATHY NERNEY

Before moving into the Caswell House, Kathy was living with family in Minnesota. Kathy is recently retired and for years prior, she was a library assistant. She likes to go shopping and frequent many restaurants. Linda enjoys helping out around the house with chores like folding laundry, cooking, and organizing. She loves to visit, go for walks, and has become close friends with housemate Linda.

CHAD KROEGR

Welcome Chad, a new member at the Caswell House. Prior to moving into Caswell, he was living at home with his parents. Chad spends his days at MSS Shoreview focusing on rec and leisure activities. He loves music; especially making music with shakers, tambourines, and anything that makes sound! Chad likes to take in the sights and sounds of the house– he enjoys observing his housemates. Chad has adjusted well and is a wonderful addition to the house.

TOM ROSE

Tom came to Phoenix from a long-term care facility in the Twin Cities and now resides at Lydia House. During the day, Tom works at PAI commerce and will be transitioning to a new position with Cub Foods in the community. This summer he enjoyed attending camp in Rochester. His hobbies and interests include spending time with family and playing basketball. Tom is very independent and uses metro transit to frequent the community for shopping and dinner outings.

ADEYEMI DEAN

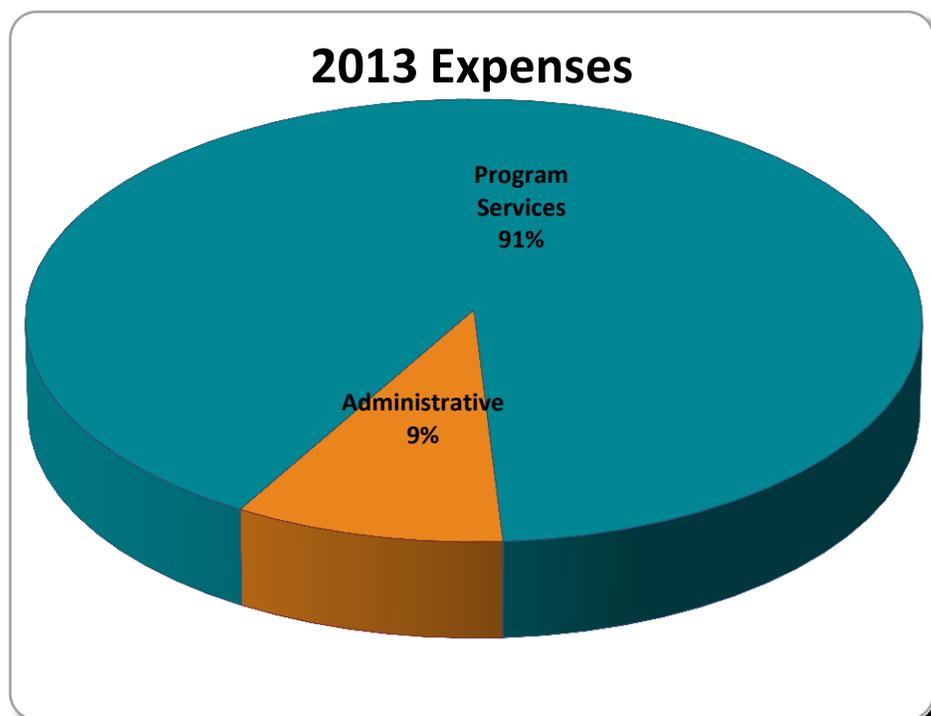
Prior to moving into the Howard House, Adeyemi was living with family members. Amy, as he prefers to be called, attends school at the Next Step program where he is working towards his high school diploma. On the weekends, you will find Amy working at Panera Bread in Maplewood. In his spare time, he likes to spend time with his family and make cookies for his housemates. Amy has a love for music, pop culture, and the mall.

RICHARD DUREN

Phoenix said goodbye to a dear friend, Richard Duren. Richard was a part of the Phoenix family for over a year living at the Caswell House. He was an avid fan of Elvis. He also liked going for walks, shopping, his iPod, and enjoyed visiting. Richard was close to his family, particularly his niece Faye.

financial statements

STATEMENT OF FINANCIAL POSITION			STATEMENT OF ACTIVITIES		
Assets	2013	2012	Revenue & Support	2012	2012
Cash	\$614,224	\$1,419,421	Program Services	\$9,324,408	\$9,163,930
Accounts Receivable	\$1,082,553	\$816,759	Donations & Special Events	\$126,955	\$88,858
Property & Equipment	\$6,524,421	\$6,363,562	Interest & Other	\$4,200	\$7,396
Other	\$84,886	\$131,902	Total Revenue	\$9,455,563	\$9,260,184
Total Assets	\$8,306,084	\$8,731,644	Expense		
Liabilities and Net Assets			Program Services	\$8,414,794	\$8,021,135
Current Liabilities	\$938,597	\$890,872	Administrative Expense	\$865,124	\$865,124
Long-Term Debt	\$1,708,385	\$2,341,719	Fundraising	\$15,596	\$15,596
Total Liabilities	\$2,646,982	\$3,232,591	Total Expenses	\$9,295,514	\$8,901,855
Net Assets			Change in Net Assets	\$160,049	\$358,329
Unrestricted	\$5,478,855	\$5,195,058			
Temporarily Restricted	\$180,247	\$303,995			
Total Liabilities and Net Assets	\$8,306,084	\$8,731,644			



donations

Over \$5000

Gerald D Deeney Trust

\$2500 -\$5000

CBS Construction Services, Inc.
Mary and Thomas Deeney
K & L Building and Remodeling Co.
John and Shirley Myers
Jeff and Debbie Schmitt

\$1000-\$2499

Anchor Bank, N.A.
Mary Jo and Jerry Bailey
Banks and Company LLC
BraunAbility/Cummings Mobility
Marion Burhardt
Mary Ann Corbey
Paul Dwyer Family
Robert and Jennifer Ellis
Financial Concepts
Geritom Medical, Inc.
John's Procure Lawn Maintenance &
Plowing
John Kuhrmeyer/AXA Advisors
Lanigan & Kolb, LLP
Lund Food Holdings, Inc.
McKesson Medical-Surgical
Mary Jane Morrison
New Park Lions Club
Stephen and Louise Pfeiffer
Ann Sagnes
Rick and Diane Schmitt
Eric and Mary Claire Schultz
South Robert Street Business Association
Wilson Tool International

\$500-999

Brown & Brown Insurance
Patrica Deeney Burns
Quality Abstract, Inc.

\$100-499

Virginia Aasen
Antonsen Construction Inc.

Roger Booth
Josephine Bredesen

\$100-499 Continued

Becky Butler
Dona Caswell
Christensen Group Insurance
Liana Cohan
Paul and Mary Coons
Sandra and William Crom
Louise Davidson
Jody Docken
Katherine Dwyer
John and Colleen French
Gerry's Fire and Safety, Inc.
Regina and Ronald Gilgenbach
Kirsten and Eric Gregerson
Duane and Susan Harves
Darin S Husaby Agency
Sandra and Wilbur Husaby
Kim Johnson-Calhoun
Roxanne Kasal
Kremer Services, LLC
Richard and Sharon Lanigan

Alexandra Lape
Daniel Lippert
Douglas Moore
Mike and Karen Norman
Karen Olson
Park-Port Lioness
Michelle Peltier
Tim and Wendy Price
R Douglas Realty
Reliable Medical Supply, Inc.
Jean and Andy Schmidt
Darlene Scott
Donald and Jerelyn Slinger
Patricia and Neil Smith
Ramona Strom
Tenvoorde Ford
Mary and James Thirsten
Twin City Janitor Supply, Inc.
Michael and Laurie Udenberg
Ultimate Fleet Repair
Ken and Mary Beth Ward
West St Paul Commercial Club
Western National Mutal Insurance
Company
Paul and Ellen Wilson
Ther Yang

donations, continued

Up to \$99

Stephanie Ahrens
 Mathew Beconovich
 Tanya Berg
 Michael and Sandra Blanchard
 Rita Bossard
 Shawn and Dawn Bushinski
 Gayle Calhoun
 Pat Callinan
 Shirley Carlton
 Patrica Casey
 Anna Chamberlain
 Albert and Beverly Cicchese
 Patrick W Collins
 Pam Connolly
 Muriel Copp
 Dannie and Dianne Duncan
 Ellen Duncanson
 Jo Ellen Duncanson
 Barbara Dwyer
 Gene and Florence Engelbrecht
 Denise Evans
 Richard Fisher
 Sherry Gray
 Sandra and Jeffrey Hagen
 Brenda Hamilton
 Richard Hopkins
 Kim Human
 Mae Etta Jarvis
 David Joarnt
 Mary and Mark Joarnt
 Rose Joarnt
 Michael and Jill Joseph
 Meredith Jurowski
 Pam and Jim Kranz
 Dorrance and Nancy Larson
 Veronica Lock
 David Patrick Madera and Donna Madera
 Thomas Madera
 Georgia Patrick
 Carole Pfaff
 J H and E M Phelps
 John and Myrna Phillips
 Queen Esther Chapter 26
 Peg Ruetten

Up to \$99 Continued

Tim and Valerie Sailor
 Harold Scott
 Linda Stromgren
 J. M. and Craig Swanson
 Edward and Lucy Tanner
 Lorraine Timmons
 Mary Vilmur

memorials and honorariums

In Memory of Robert Nelson

Elaine and Larry Kluge

In Memory of Mary Mergens

Pat Callinan

In Memory of Owen Gall

Gail Steiner

board of directors

Dr. Richard Ivance

➤ *Chairman*

Eric Schultz

➤ *Past Chairman*

Steve Pfeiffer

➤ *Treasurer*

Mary Jo Bailey

➤ *Director*

Paul Coons

➤ *Director*

Edward G. Gutzman

➤ *Vice-Chairman*

Kirsten Gregerson

➤ *Secretary*

Jean Schmidt

➤ *Director*

Derrick Banks

➤ *Directors*

Darlene Scott

➤ *Phoenix President / CEO*

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