

# 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.

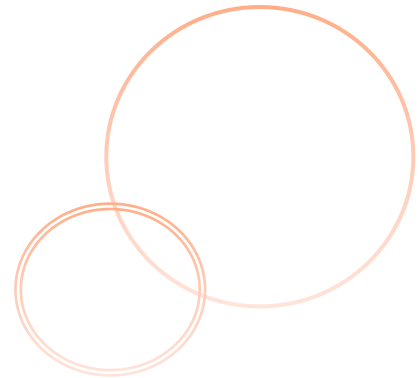
People *must* have a choice in their everyday decisions; including where they live and with whom. It is a civil right! I react negatively to setting limits on individual choices – I see it as an infringement on human rights.

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](http://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

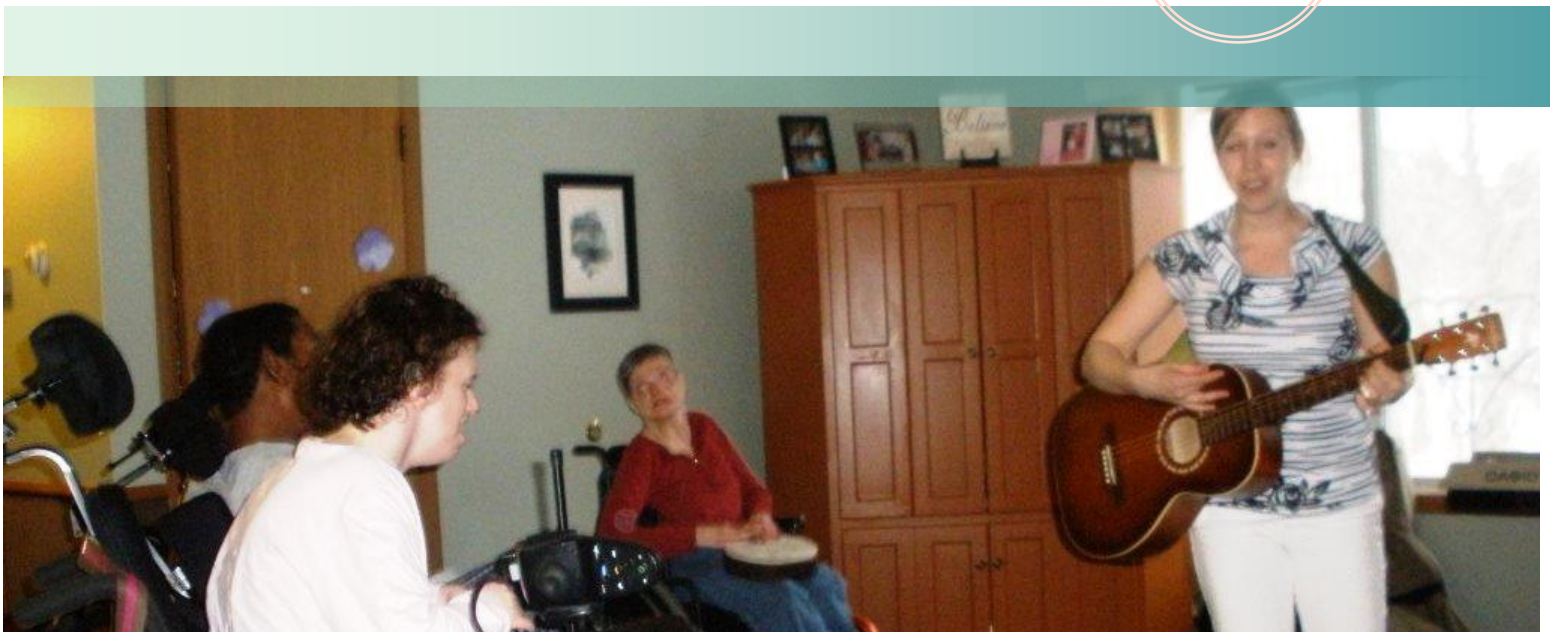
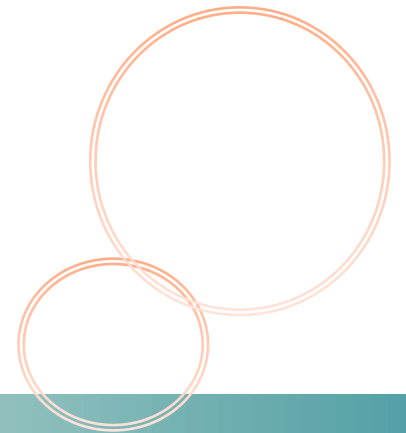
The Phoenix Residence was recently awarded a grant from the Hubbard Broadcasting Foundation. The funds received will be used for the continuation of music therapy at English, Centerville, and Janet Court.

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' Stellan, 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

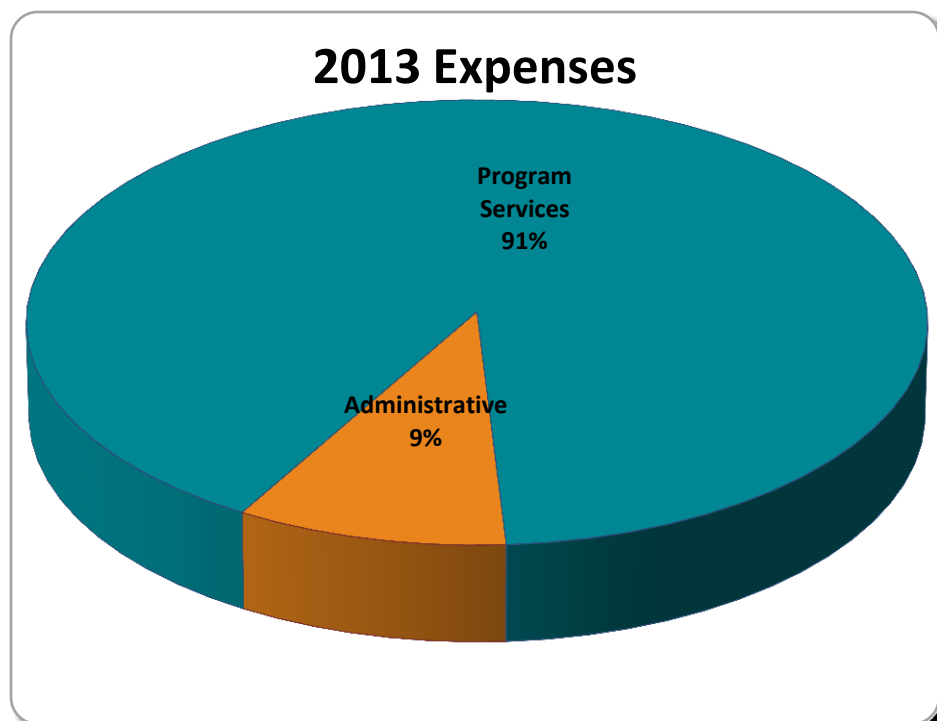
Prior to moving into the Howard House, Adeyemi was living with family members. Amy, as he prefers to be called, attends school at the Next Step program where he is working towards his high school diploma. On the weekends, you will find Amy working at Panera Bread in Maplewood. In his spare time, he likes 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		
<b>Assets</b>	2013	2012	<b>Revenue &amp; Support</b>	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	<b>Total Revenue</b>	\$9,455,563	\$9,260,184
<b>Total Assets</b>	\$8,306,084	\$8,731,644	<b>Expense</b>		
<b>Liabilities and Net Assets</b>			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
<b>Total Liabilities</b>	\$2,646,982	\$3,232,591	<b>Total Expenses</b>	\$9,295,514	\$8,901,855
<b>Net Assets</b>			<b>Change in Net Assets</b>	\$160,049	\$358,329
Unrestricted	\$5,478,855	\$5,195,058			
Temporarily Restricted	\$180,247	\$303,995			
<b>Total Liabilities and Net Assets</b>	\$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*

## contact

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