



Annual Report 2014



Honoring our *Past*,
Treasuring the *Present*



The Phoenix Residence, Inc.
330 Marie Ave East
West St. Paul., MN 55118

President's *Message*

Honoring our Past and Treasuring the Present . . .

Memories really are treasures! As I reflect back on the people I have been blessed to know through my tenure at Phoenix Residence, I am fortunate how rich my life is as a result of these encounters. Looking back to where we have come from as an organization and honoring those who have been instrumental in getting Phoenix to where it is today is humbling.

It has been over 40 years since The Phoenix Residence incorporated in August 1974. There are hundreds if not thousands of people who have made a huge impact on our organization and the services we provide.

Beginning with our founder **Margaret Ludden**; I will never forget her passion and the sacrifices she made for the birth of this organization. Margaret formed a coalition to help with the advancement including **Russ Douglas** who participated in much of the development, planning, and design for the first facility in St. Paul.

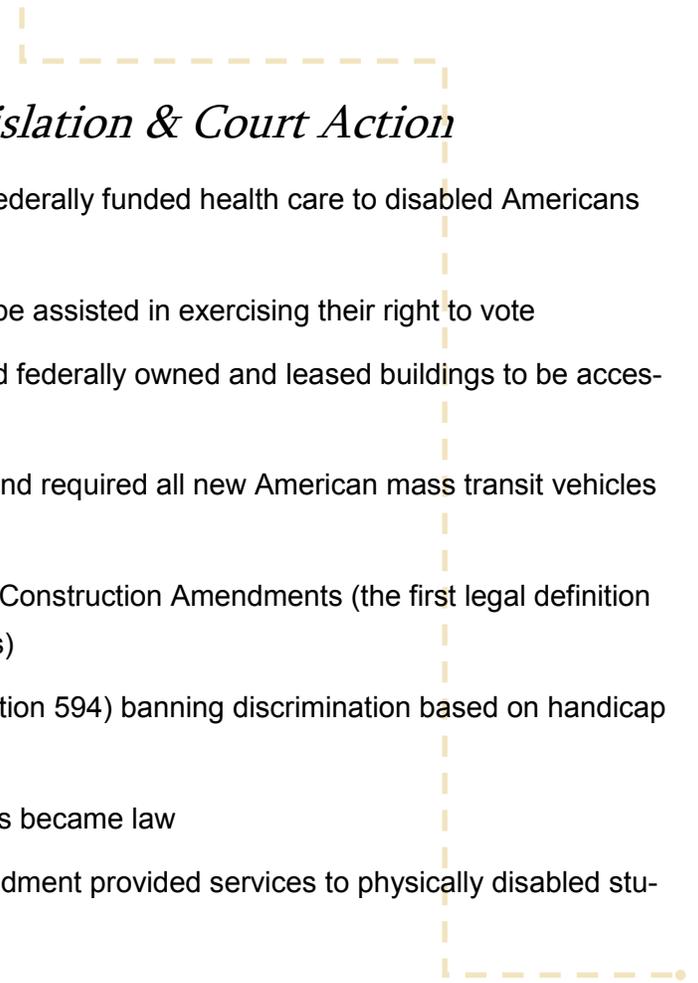
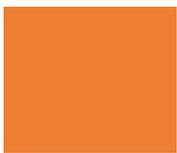
We have been blessed with long standing employees and the steadfast leadership from our board of directors who have worked tirelessly for this organization; **Mary Jo Bailey, Edward Gutzmann, Dr. Richard Ivance and Eric Schultz.**

Since the early days of the 1970's, many things have changed in our industry; our attitude about how and where services are delivered, the language we use to talk about people with disabilities, and most importantly, the laws and regulations that have evolved to person-centered philosophies.

We are certainly grateful to all who came before us to mold our organization to what it is today! This annual report is dedicated to *honoring our past and treasuring the present.* We would simply like to say thank you for all of those who have contributed in big and small ways to the success of The Phoenix Residence and filling **our memory banks with beautiful stories!**

~ **Darlene Scott , President CEO**





Looking Back—*Past and Present Legislation & Court Action*

- 1965** ~ Medicare & Medicaid were established providing federally funded health care to disabled Americans by Social Security Program
- 1965** ~ Voting Rights allowing persons with disabilities to be assisted in exercising their right to vote
- 1968** ~ Architectural Barriers Act became law and required federally owned and leased buildings to be accessible for disabled people
- 1970** ~ The Urban Mass Transportation Act became law and required all new American mass transit vehicles to be equipped with wheelchair lifts
- 1970** ~ Developmental Disabilities Services and Facilities Construction Amendments (the first legal definition of Developmental Disabilities became law in United States)
- 1973** ~ The American Rehabilitation Act became law (Section 504) banning discrimination based on handicap – any program or activity receiving federal assistance
- 1975** ~ Developmental Disabilities Assistance Bill of Rights became law
- 1976** ~ The American Higher Education Act of 1972 amendment provided services to physically disabled students entering college
- 1980** ~ The Civil Rights of Institutionalized Persons Act
- 1990** ~ American with Disabilities Act signed into Law
- 1995** ~ (*Olmstead v. L.C.*) was a case filed in 1995 and decided in 1999 before the United States Supreme Court
- 1999** ~ In *Cedar Rapids Community School District v. Garret F.*, the U.S. Supreme Court ruled that taxpayer-supported schools are responsible for the costs of providing continual care for disabled students under a federal law that says all children must receive "free, appropriate public education"
- 2009** ~ Federal class-action lawsuit was filed on behalf of individuals who had been subjected to seclusion or restraint at the Minnesota Extended Treatment Options (METO) program
- 2010** ~ The 21st Century Communications and Video Accessibility Act, known as CVAA, was signed into law
- 2010** ~ Rosa's Law, which changed references in many federal statutes that referred to "mental retardation" to make them refer, instead, to "intellectual disability", became law in the U.S.
- 2010** ~ The Patient Protection and Affordable Care Act became law
- 2011** ~ On March 15, 2011, new Americans with Disabilities Act rules came into effect. These rules expanded accessibility requirements for recreational facilities such as swimming pools, golf courses, exercise clubs, and boating facilities

2014 is a Successful Legislative Session

During the 2014 Legislative Session, Gov. Dayton and the Legislature enacted a 5% rate increase for Home and Community Based Services. Before these increases, the 86,500 Minnesota health care professionals who provide high-quality care for Minnesotans with disabilities had not received a wage increase since 2009.

From 2007 to 2011, Minnesota's provider reimbursement rate rose less than 2%, while inflation increased by over 10%. Stagnant wages have created significant hardships for Direct Support Professionals (DSP) – straining their ability to care for those with disabilities. In fact, many DSPs in Minnesota have been forced to find second jobs, or find alternative positions in higher-paying industries. (Minnesotans Celebrate Wage Increase for High-Quality In-Home Care. *Office of Governor Mark Dayton*. 2014)

Raising the wages will help attract and maintain a high-quality workforce – helping improve the lives and care options of Minnesotans with disabilities. Ensuring our most vulnerable friends, neighbors, and loved ones have access to high-quality care helps them live more independently, and avoid more costly and restrictive settings.

A big thank you to everyone for contacting your legislature about the importance of The 5% Campaign.



Each year advocates from around the state gather for ARRM's Day at the Capitol in St. Paul to raise awareness about important disability issues. Before and after the rally, advocates from The Phoenix Residence meet with legislators to address priorities affecting people with disabilities, their families, and those who support them.





Service Learning and Community Partners

With a goal of increasing our volunteer pool, The Phoenix Residence has partnered with Inver Hills Community College and Century College as a Community Partner. As a Community Partner, we offer students an opportunity to learn in a community setting, gaining real-world work experiences.

Many courses of study require students to complete a service learning opportunity throughout the school year. Programs and majors such as human services, nursing, or psychology; making The Phoenix Residence a perfect fit. After only a few months, we have received favorable feedback and have placed ten students with people served by Phoenix.

Students are required to complete an average of 20 service learning hours. Many have stated they would like to continue to volunteer once they have completed the service learning opportunity.

The students are provided a description of their duties which includes participation in daily living activities with the individuals we serve. Activities include playing games, socializing and companionship, engagement activities, review programming, meal planning/preparation, and other tasks as assigned.

The Phoenix Residence plans to continue our service learning focus by reaching out to other schools who offer similar community and service learning opportunities.



Students from both Inver Hills Community College and Century College partner with individuals we serve throughout the school year.

Volunteer Spotlight

At The Phoenix Residence we are always looking for volunteers to support the individuals we serve – if you have a talent or special skill you would like to share, we would love to hear from you. To see a full list of our current opportunities, check out the listing of volunteer opportunities on VolunteerMatch.org and search for The Phoenix Residence.

“Quinn, a volunteer at Caswell House, has been busy painting nails and baking with the individuals we serve.

Quinn is a resident of White Bear Lake and volunteers at Caswell one evening per week. She is fun loving and has a great sense of humor; everyone looks forward to her visits.”



“Julia, an employee at U.S. Bank, is currently a volunteer at the Viking House. She visits Viking twice a month and always brings a fun activity to share.

During her visits, she plays cards and the Wii, paints fingernails, and even planned an evening of “candy bar” bingo! She brings a smile to everyone’s face and the folks at Viking certainly look forward to her visits.”



Organizational Changes at Phoenix Residence

The health and human service profession in Minnesota is currently undergoing imminent changes. In order to remain relevant, comply with the Olmstead Plan, and to best align our resources with the needs of the disability services community, Phoenix Residence made organizational changes.

The Phoenix Residence created the Community Living Coach (CLC) position - this newly created position supports the Program Managers and assists with care plan development as well as overall management of our community programs. The new CLCs are Ther Yang, Sarah Dearhamer, and Laura Carr.

Meredith Jurowski has been hired as the newly created Program Director/Housing Specialist. Meredith has years of experience at The Phoenix Residence and will be a crucial member in expanding our services with identifying creative housing opportunities.

The Phoenix Residence has served the disability services community for nearly 40 years and it is our intent to continue to remain a viable option for individuals with disabilities and an employer of choice.



Russ Douglas Phoenix Golf Classic and Made in the Shade

Another successful Russ Douglas Phoenix Golf Classic is in the books! Over \$40,000 was raised in support of our organization. A big thank you to those who made this day such a huge success . . . Our major sponsors, golfers, volunteers, and those who donated items to the silent auction and wall-of-wine.

Platinum Level Sponsors

CBS Construction

Gold Level Sponsors

Byerly's Online Shopping

Geritom Medical, Inc.

John's ProCare

NFP

Lynn and Dave Myhr

Rick and Diane Schmitt

Eric and Mary Claire Schultz

Silver Level Sponsors

Anchor Bank, N.A.

Mary Jo and Jerry Bailey

Carlson Advisors

Cummings Mobility/BraunAbility

John Kuhrmeyer/AXA Advisors

Success Computer Consulting

Bronze Level Sponsors

Banks and Company, LLC

CBL Floors

K & L Building and Remodeling Co.

McKesson Medical

Steve and Louise Pfeiffer

Tenvoorde Ford

The Phoenix Residence again participated in Made in the Shade, held at Lake Calhoun in Minneapolis September 20, 2014. 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.

It is a fun event for everyone—over 130 people walked in support of our organization.



Made in the Shade begins with a walk around Lake Calhoun followed by lunch and entertainment by the Moss Piglets. Ten organizations similar to The Phoenix Residence partner their resources and time to organize the event.



Outstanding Board Members Honored

This year, we honored three outstanding individuals who have dedicated many years of service and resources to our organization—Mary Jo Bailey, Dr. Richard Ivance, and Ed Gutzmann.

Mary Jo first became involved with The Phoenix Residence in 1990 as a board member. She has held many offices including chairperson of the board and was a member of the Special Events Committee, assisting with planning our largest fundraiser the Russ Douglas Phoenix Golf Classic.

Dr. Ivance, a board member since 1981 has been a key member to our organization. Dr. Ivance practiced as an orthopedic surgeon for over 30 years. His medical advice and experience has been invaluable. He currently serves as a member of our Utilization Review committee.

Ed has been a long standing board member at The Phoenix Residence. He was first introduced to our organization by Russ Douglas, our founding chairman. Over the years, Ed served in many capacities including chairman of the board, treasurer, and a member of the executive committee.

Thank you Mary Jo, Ed, and Dr. Ivance for your dedication and years of service



Grants and Foundations

Hubbard Broadcasting Grant

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

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 Gertens Spring Bedding Plant Fundraiser.

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!



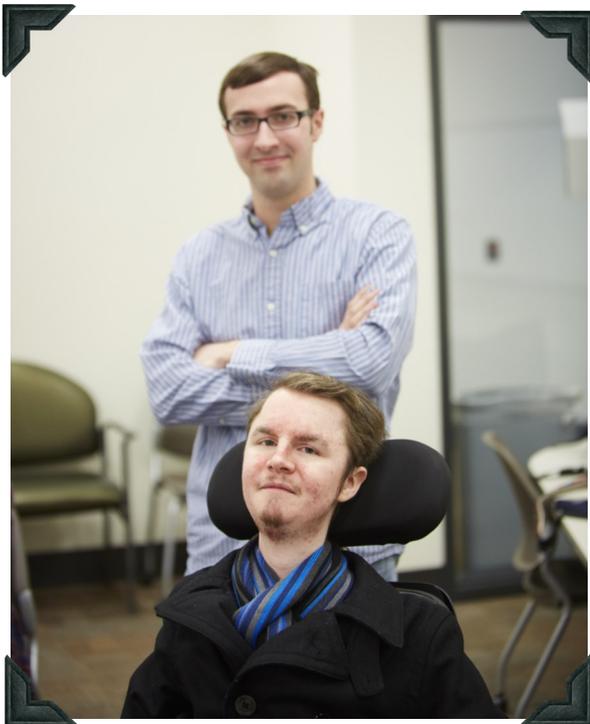


Grants

F.R. Bigelow Foundation Grant

In the support of our independent living options program, The Phoenix Residence was awarded \$25,000 from the F.R. Bigelow Foundation. The funds will be used to help secure housing and cover other expenses to launch the program.

As an organization, we would like to extend our services and supports to include independent housing options. as many Minnesotans with disabilities would like to choose their *own* living environment. The Phoenix Residence will help secure housing options and provide the necessary supports. Our goal is to provide services in the most integrated setting appropriate to needs.



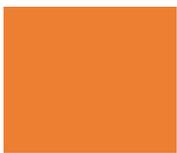
National Direct Support Professional Week

Every September, The Phoenix Residence and other providers celebrate and honor Direct Support Professionals (DSP) during National DSP week. We recognize the dedication and accomplishments of our outstanding DSP's – we appreciate their vital contributions to our organization.

During DSP Week, Phoenix Residence planned many exciting activities to celebrate our hard-working DSP's including a photo contest. "Phoenix All-Stars" was tagged as the 2014 theme and was incorporated in all activities throughout the week.

Each program is encouraged to participate in the photo contest including staff and individuals we serve and a traveling trophy is awarded for the winning entry. Newport House was declared the winner for the past two years! Below is the photograph taken on Target Field.





Welcome Board Members Jim Hughes and Jeff Bauer

The Phoenix Residence would like to welcome our newest board members Jeff Bauer and Jim Hughes.

Jeff is the Event Supervisor of the MobilePack Division for Feed My Starving Children (FMSC) where he manages food packing events around the country. Jeff states his position at FMSC is very rewarding as he is often overwhelmed by the enthusiasm and generosity of the volunteers and donors.

As the newest member of The Phoenix Residence board, Jeff is excited to learn from experienced board members and use his personal and professional experience to leverage more opportunities for the individuals served by The Phoenix Residence.

A Minnesota native, Jeff is married and currently resides in Eagan with his dog Samson and cat Lucy. He enjoys reading philosophy and classic literature, watching movies of all types, and bowling. And of course, Jeff enjoys volunteering at Feed my Starving Children.



Jeff Bauer

The Phoenix Residence would like to welcome its newest board member, Jim Hughes. Jim is a current employee of Heinrich Envelope Corporation, a division of Taylor Corp, as a Marketing Representative specializing in business-to-business sales. His past work experience has provided him a diverse background in many industries including manufacturing and management. Jim also recently completed his MBA at St. Mary's University.



Jim Hughes

As a newer member of the board, Jim looks forward to the challenge of being actively involved with The Phoenix Residence board of directors. Originally from southern Minnesota, Jim currently resides in the northwest suburbs of Minneapolis and has lived in the metro area for over 30 years.

Jim and his wife Pauline enjoy biking, walking, snow shoeing, ballroom dancing, art, and music of all types.



Welcome and Goodbye's

The Phoenix Residence would like to welcome the individuals who became a part of the Phoenix family in 2014.

Emily Myhr ~ Eric's House ~ *Emily enjoys watching movies and is particularly fond of Charlotte's Web and any Barney feature. She is very close to her family and relishes spending time with her loved ones. Emily likes sporting events; especially the Minnesota Wild.*

Wendy Severson ~ Eric's House ~ *Wendy likes to shop, play bingo, enjoys watching movies, and appreciates a good cup of coffee. She also enjoys spending time with her family on the weekends. Wendy is a member of the Lioness Club in St. Paul Park and was recently named "Lioness of the Year".*

Julie Stapf ~ Eric's House ~ *Julie enjoys going for walks, watching movies, shopping, and visiting to the zoo. Julie is close to her family and has a special relationship with her mom. You will often hear Julie sharing jokes and likes to make others laugh!*

Elizabeth Bloom ~ Suburban House ~ *Elizabeth, a social butterfly, loves to get dressed up for the holidays. She likes to listen to music, go for walks, and listen to books. She is very close to her family, especially her mom. During the day she attends PAI in Oakdale.*

Mark Schulzetenberg ~ Suburban House—*Mark is very interested in religion and has a masters in Theology. He recently received an iPad and likes to watch the FOX News channel and loves to talk politics. During the day, he attends the Cerenity DayAway Program.*

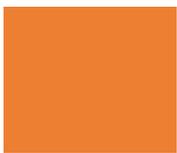
We lost friends in 2014, many who have been with the Phoenix family for many years.

Mary Mayer ~ Carver House ~ *Mary was a member of the Phoenix family for 5 years. She was very kind and well-liked by her housemates. She is missed at Carver House.*

Kathryn Ryan ~ Foss House ~ *Kathryn was a member of the Foss for many years. She liked to read the paper, liked having her nails done, and enjoyed working at MSS Ocean.*

Jeff Lock ~ Ludden House ~ *We said goodbye to a long-time member of the Phoenix family, Jeff Lock. Jeff was a huge sports fan, especially the Minnesota Vikings. Most recently, he worked at PAI.*

David Lommen ~ Suburban House ~ *David had a laugh that was contagious and could brighten anyone's day. He loved being outdoors no matter how hot or cold and enjoyed his evening coffee. Every Monday, he looked forward to contacting his parents and enjoyed their visits. David is missed by everyone at The Phoenix Residence.*



Donations

Over \$5000

F. R. Bigelow Foundation

\$2500-\$5000

CBS Construction Services, Inc.

Geritom Medical, Inc.

John and Shirley Myers

Eric and Mary Claire Schultz

South Robert Street Business Assoc.

1000-\$2499

Anchor Bank, N.A.

Mary Jo and Jerry Bailey

Banks and Company LLC

Mary Ann Corby

BraunAbility/Cummings Mobility

Byerly's Online Shopping

Paul Dwyer Family

Hubbard Broadcasting Foundation

John's Procure Lawn Maintenance & Plowing

John Kuhrmeyer/AXA Advisors

K & L Building and Remodeling Co.

Lanigan & Kolb, LLP

1000-\$2499, Continued

McKesson Medical-Surgical NFP

Stephen and Louise Pfeiffer

Rick and Diane Schmitt

Success Computer Consulting

Ramona Strom

Wilson Tool International

Ramona Strom

\$500-\$999

CBL Floors

Christenson Group

Katherine Dwyer

Jeff and Debbie Schmitt

Twin City Janitorial Supply

Ultimate Fleet Repair

\$100-\$499

Leigh and Grant Barrette

Skip and Linda Benson

Cleyone and Shirley Bergquist

Roger Booth

\$100-\$499, Continued

Jo Bredesen

Brown & Brown Insurance

Patrica Deeney Burns

Becky Butler

Carlton Insurance Marketing

Sharon Constantine

Paul and Mary Coons

Sandra and William Crom

Dakota Electric

DASSOC Painting, LLC

Tom Deeney

Darin S. Husaby Agency

Dave Douglas

Robert and Jennifer Ellis

Gerry's Fire & Safety

Sherry Gray and David Blaney

Handi Medical Supply

Lyth Hartz

Duane and Susan Harves

Barbara Husaby

Richard and Joy Ivance

Libby and Miguel Jeldes Johnson



Donations

\$100-499 Continued

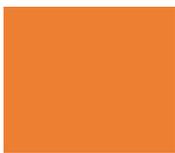
- Rose Joarnt
- Kim Johnson-Calhoun
- Roxanne Kasal
- Alexandra Lape
- Daniel Lippert
- Bernadine Lortis
- Delores and Jerome Ludden
- David and Donamari Mayer
- Mary Jane Morrison
- Mike and Karen Norman
- Karen Olson
- Diana O'Neil
- Park-Port Lioness
- Michelle Peltier
- Wendy Price
- Reliable Medical Supply, Inc.
- David Rossmiller
- Ann Sagnes
- Jean and Andrew Schmidt
- Barb Schmitz
- Janice Schneider
- Julie Schultz and David Kilpatrick

\$100-499 Continued

- Darlene Scott
- Gary Selinsky
- Paul and Sharon Severson
- Donald and Jerelyn Slinger
- Patricia and Neil Smith
- The Sportsman's Guide
- Betty Stapf
- Mary Thirsten
- Michael and Laurie Udenberg
- Vadnais Heights Lions Club
- Ken Ward
- Ralph Wassman
- Western National Mutual Insur-
- Paul and Ellen Wilson
- Up to \$99**
- Virginia Aasen
- Courtney Barrette
- Daniel and Sandra Beedle
- J.A. Benoy
- Jennifer Buchanan
- Pat Callinan

Up to \$99 Continued

- Patricia Casey
- Lyle and Cheryl Chacka
- Albert and Beverly Cicchese
- Jody Curl
- Bruce Dahlman
- Ellen Duncanson
- Jo Ellen Duncanson
- Gene and Florence Engelbrecht
- Sandra and Wilbur Husaby
- Mae Etta Jarvis
- Elizabeth Johnson
- Meredith Jurowski
- Joel Kalle
- Pamela and James Kranz
- Veronica Lock
- Daniel and Julie Ludden
- Donella McGee
- Andrew and Anna Nichols
- North Central Med Supply Inc
- Benjamin and Katherine Olin
- Margaret and John Olin
- Carole Pfaff



Donations

Up to \$99 , Continued

Kimberly Phillips

Charles and Louise Price

Wendy Price

Queen Esther Chapter #26

Tim and Valerie Sailor

Jeri Lyn Smith

J.M. and Craig Swanson

Phung Tong

Mary Vilmur

Jennifer and Bradley Wilhelmy

Memorials

In Memory of David Lommen

Pat Callinan

In Memory of Peg and Mary Claire Schmitt

Jody Curl

In Memory of Mary Mayer

Daniel and Sandra Beedle

In Memory of Jeff Lock

Pat Callinan

Jennifer & Bradley Wilhelmy

Veronica Lock



Financials

STATEMENT OF FINANCIAL POSITION

Assets	2014	2013
Cash	\$1,029,157	\$614,224
Accounts Receivable	\$889,483	\$1,082,553
Property & Equipment	\$6,629,344	\$6,524,421
Other	\$63,633	\$84,886
Total Assets	\$8,611,617	\$8,306,084

Liabilities and Net Assets

Current Liabilities	\$958,107	\$938,597
Long-Term Debt	\$1,439,544	\$1,708,385
Total Liabilities	\$2,397,651	\$2,646,982

Net Assets

Unrestricted	\$5,995,591	\$5,478,855
Temporarily Restricted	\$218,375	\$180,247
Total Liabilities and Net Assets	\$8,611,617	\$8,306,084

STATEMENT OF ACTIVITIES

Revenue & Support	2014	2013
Program Services	\$10,173,763	\$9,324,408
Donations & Special Events	\$105,209	\$126,955
Interest & Other	\$16,531	\$4,200
Total Revenue	\$10,295,503	\$9,455,563

Expense

Program Services	\$8,640,104	\$8,414,794
Administrative Expense	\$1,072,738	\$865,124
Fundraising	\$27,797	\$15,596
Total Expenses	\$9,740,639	\$9,295,514

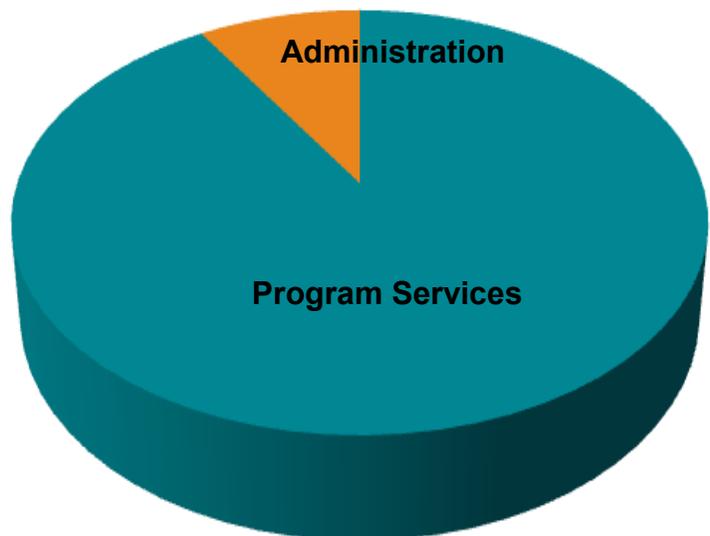
Change in Net Assets

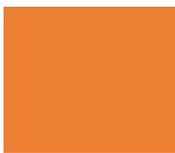
	\$554,864	\$160,049
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2014 Expenses

91% Program Services

9% Administration





The Phoenix Residence Board of Directors

Steve Pfeiffer
Chairman

Derrick Banks
Vice-Chairman

Dr. Richard Ivance
Past Chairman

Jean Schmidt
Secretary

Kirsten Gregerson
Treasurer

Paul Coons
Director

Mary Jo Bailey
Director

Jennifer Buchanan
Directors

Edward Gutzmann
Director

Darlene Scott
President/CEO

Jeff Bauer
Director

Eric Schultz
Director

Jim Hughes
Director

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