



Annual Report 2016

July 2016 - October 2017



CELEBRATING
40 YEARS



The Phoenix Residence, Inc.
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651-227-7655 | www.phoenixresidence.org





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Message from the President

Phoenix Celebrates 40 Years

Dedicated to the Ludden Family in Memory of Margaret Ludden

In honor of our 40th Anniversary, we held an open house on October 15, 2017 at Jimmy's Event Center in Vadnais Heights, to celebrate this important milestone in our organization's history. In the words of Margaret Ludden, our founder, "There is no way to share the history of The Phoenix Residence, Inc. without referring to the entire family of Robert and Margaret Ludden, and especially John, our oldest son who was diagnosed as an individual with cerebral palsy/spastic condition incurred at birth." Ultimately, the Luddens had ten children, all of whom had some involvement or connection to the Phoenix project.

Forty years ago on October 5, 1977, John Ludden was the first resident to move into a barrier-free architectural residential facility for persons with developmental and physical disabilities (located at 135 Colorado St. E in St. Paul, Minnesota). The building boasted a state-of-the-art design with a common entrance and private bedrooms for 48 individuals. According to Margaret, prior to the Phoenix project plan, there were no known supervised living programs in the United States, and specifically not in Minnesota. A mere ten years later, The Phoenix Residence had provided services to over 100 people and expanded to two locations, an apartment at Wheelock Ridge Villa and a home at 435 Clinton Ave. in St. Paul.

Phoenix Residence Honorees

This year we've had the opportunity honor 40 people who have made a difference here at The Phoenix Residence. This year's honorees include:

Calhoun Family
CBS Construction Team
Darlene Scott
Dave Douglas
Deeney Family
Diane Berg
Dona Caswell
Douglas Family
Dr. Richard Ivance
Dr. David Rossmiller
Dwyer Family
Ed Gutzmann
Eric Schultz

Foss Family
Jenny Wilhelmy
Joarnt Family
Jody Curl
John and Shirley Myers
John Capetz
John Kuhrmeyer
Jon Colby
Kim Strader
Lippert Family
Liz McCambridge
Louise Davidson
Lynn and Dave Myhr

Mary Ann Corbey
Mary Jane Morrison
Mary Jo Bailey
Mary Thirsten
Mike Kelly
Pam Connolly
Pat Callinan
Paul Dwyer
Schmitt Family
Severson Family
Steve Pfeiffer
Tom Ludden
Wally Sherseth



When The Phoenix Residence celebrated its 20th Anniversary in 1997, Margaret and John Ludden were there to celebrate with us. Little did we know, this would be the last anniversary celebration they would attend. John enjoyed his life at English House until his death in 2004, passing away within six months of Margaret's death. Margaret indicated in an article published by the *St. Paul Voice* in 1997, "She is confident that her dream is in very capable hands, and she could not say enough about the wonderful dedicated staff at The Phoenix Residence, Inc."



By 2007, Phoenix had transformed from its flagship facility to six-bedroom homes in communities near individuals' families, friends and workplaces. It is amazing to reflect on the shifting of society views over the last 40 years. At one point, it was believed that people with disabilities could not be served in the community and that there was no benefit in attempting to connect these people with their families. Now, we recognize our citizens with disabilities as valuable members of our community, along with our desire to integrate them fully into the community—by opening doors, not closing them.



The Phoenix Residence would like to thank everyone who has contributed to making this organization great! We have served over 500 people, expanded to the seven-county metro area, and are now serving people across a spectrum of needs, from around-the-clock care in group homes to

services in one's own home. Phoenix employs 260 individuals, and we will continue in our journey of expanding our person-centered services. The celebration at Jimmy's was well attended. We took the opportunity to recognize and honor some individuals and families for their ongoing support of our organization. Please see the honorees listed on the previous page.

I cannot say "thank you" enough to everyone who is dedicated to our mission and the work of The Phoenix Residence, Inc. It is because of each of you that we continue the legacy that Margaret Ludden started over 40 years ago!

Darlene Scott
President & CEO



Looking Towards the Future

When the Ludden family opened the doors to the original Phoenix Residence, it was hard to imagine where the future of disability services was headed. Fortunately today, the field is a cornucopia of services throughout the state—thanks to the hard work and perseverance of the Luddens and many others families like them.

However, where we are today is nowhere near the end of the journey—instead, it is only the beginning. Individuals have left institutions and now live and work in their community. But, the next chapter in their lives is to help them build their own communities where they want them according to their vision.



With the mandate of an ambitious Olmstead Plan, Minnesotans with disabilities will realize the full empowerment of citizenship with all the rights and responsibilities that it entails. And the next generation of Phoenix will walk beside them on this journey. With a focus on employment, housing, education, and community engagement, The Phoenix Residence is continually promoting a better quality of life for individuals with disabilities.

Our sister corporation, Phoenix Service Corporation (PSC), is also looking towards the future by working to end homelessness. PSC partners with Washington and Ramsey counties to provide housing support to individuals experiencing homelessness. Finding affordable housing continues to be our biggest challenge, but we will continue to seek out opportunities to help these individuals find and maintain stable housing.

“I have so much more choice now than I did all those years ago.”

Bill Schroeder, moved to The Phoenix Residence in 1978

Another step in our journey of supporting individuals with disabilities is to build our expertise and services in the autism field, one of the fastest growing developmental disabilities in the United States, affecting one in 68 children. Phoenix staff are participating in training opportunities and connecting with community groups and agencies supporting individuals with autism. These opportunities will help us continue building our expertise in the coming years.

*Don't we all want the same?
Margaret Ludden would
be proud.*

As it was 40 years ago, much of what the future holds for the next half a century has yet to be envisioned. But what we do know is that it will take the same hard work, vision, and advocacy that our founders embodied to arrive at where we are today. This is by no means an easy task, but we will forever be driven, because we know we have a moral imperative to do so. We have seen how these efforts have impacted those we have served.

Company News

40th Anniversary Party a Success

It all started with a dream—Margaret Ludden, a parent of a son with disabilities, striving for a better life for her son, John. Friends, family and employees of The Phoenix Residence came together on October 15 to celebrate 40 successful years of supporting adults with disabilities.

For many, it was a walk down memory lane as much as it was a celebratory party. “I had a wonderful time... at the celebration,” said Tom Ludden, son of Margaret Ludden. “It was like a family reunion for me.”

In a room filled with balloons, an ice sculpture, and a birthday cake, what attendees remembered most were the stories told and memories recollected. Tears were shed and laughter surfaced during the program as President & CEO Darlene Scott, former family member Tom Ludden, and Board of Directors Chairman Dr. Richard Ivance, all reflected on their time with the organization.

The program concluded with a commemorative video, thanking everyone for their support. “It’s because of you that we’re celebrating 40 years. I can look around the room, and think of all of you and the great impact that you’ve had, the unbelievable sacrifice, and the tremendous effort that you’ve made and provided here at The Phoenix Residence...and for that we are so grateful to you,” Scott recalled in the video.

Although Margaret is no longer with us, her dreams live on here at The Phoenix Residence, as we continue to grow and provide exceptional service to those just like her son.





Original Individuals Continue Journey with Phoenix

Throughout our 40 years, we've been blessed to serve so many great people who have helped us write our story. We are proud of the relationships we've made with those who have come to us for support, and in turn, become part of our family.

Several of our original individuals who started this journey with us are still here today. While they may have moved locations, they've been a critical part in making The Phoenix Residence who it is today. It has been an honor to serve them for 40 years, and we'll never forget the memories we've shared throughout the years.

Thank you for allowing us to support you and be a part of your story over the years.

Mary Jane Stevens

Barb Deeney

Mike Kelly

Paul Dwyer

Gary Cavegn

Sue Foss

Bill Schroeder



Capturing 40 Years Through a Lens

To say, 'We've been successful for 40 years' is an understatement—it's remarkable. But we wouldn't be here today without the help of our sponsors, donors, vendors—and perhaps more importantly, the people we serve and their families.

To commemorate our 40th Anniversary, we created a video to embody who The Phoenix Residence is and what it means to be a part of such a great organization. In the video, we featured one of our individuals, Kim Strader, who has lived with us for over 25 years.

Throughout her time here, Strader has built a community of friends she trusts in a place she calls home. "At The Phoenix Residence...they bend over backwards to try and make us feel happy," Strader said in the video.

To view the video, please visit
www.phoenixresidence.org.

Fundraising Efforts

Teeing Off at the Russ Douglas Phoenix Golf Tournament

Despite the unpredictable weather, The Phoenix Residence teed off for the 18th Annual Russ Douglas Phoenix Golf Classic on June 12, 2017. The rain didn't keep the golfers away, however. We still had a great turnout, along with competitive bidding in the auction and plenty of wine purchases! A special thank you goes out to our guest speaker Cheryl Moore, who shared her story of her family's journey to finding Phoenix.

Although the tournament ended early, we still raised over \$39,000 this year. This would not have been possible without the incredible generosity of our sponsors, donors, volunteers, and family members. As we celebrate 40 years of service, it is certain that our founder, Margaret Ludden, would be so proud of the partners who continue to help Phoenix enrich the lives of individuals with disabilities.

Thank You to All Our Sponsors!



Mark your calendars for
next year's tournament
on **June 11, 2018!**

Platinum Level Sponsors

CBS Construction

Gold Level Sponsors

David and Lynn Myhr
Eric and Mary Claire Schultz
Family of Paul Dwyer
Geritom Medical, Inc.
John's ProCare
Lunds & Byerlys
NFP Corporate Services

Silver Level Sponsors

Anchor Bank
Carlson Advisors
Cummings Mobility
John Kuhrmeyer/AXA Advisors
K & L Building and Remodeling

Bronze Level Sponsors

CBL Floors
Darlene Scott
McKesson Medical
Minnesota Coaches, Inc.
Steve and Louise Pfeiffer
The Banks Family

Phoenix Shines Through at Made in the Shade

Friends, family members, and staff of The Phoenix Residence rekindled relationships and made new ones at Made in the Shade 2017. The September 16 walk brought together friends and family members from eight organizations just like us—all for a common cause. The organizations work together to plan this special day—a partnership that is hard to find in society today.

Made in the Shade is a non-competitive 5K walk, run and roll supporting those with disabilities. All funds raised go directly back to the individuals, supporting their specific fundraising goals. Our homes fundraised for activities, such as music therapy, weekend/day trips, and new furniture. Together as an organization, we raised just over \$12,675, just shy of last year's amount.



This year, the weather held off and everyone had a great time! After the walk around Lake Calhoun, participants enjoyed a grill-out, along with music from The Moss Piglets. *Thank you to all who came out to support The Phoenix Residence!*



Making Dreams Come True

All the hard work from Made in the Shade paid off for the gals at Eric's House. The housed raised enough money to take a weekend trip to Wisconsin. All the ladies had an amazing time, between the sightseeing, enjoying the scenery, and visiting the casino and the zoo. This trip was made possible by generous donations from the Myhr and Severson families. Thank you very much for your support!

The Phoenix Residence would like to recognize Dede Muimba, program coordinator at Eric's House. Her undeniable dedication and perseverance in providing the ladies with the trip of a lifetime, speaks volumes of her as a manager.

"One of the ladies has a serious medical condition that required close monitoring and strict guidelines to keep her healthy," said Vice President of Operations Mary Thirsten. "The confidence her parents must feel in Dede's ability to manage the health care of their daughter shows how much Dede has done to build trust in the families of the people we support." *Thank you Dede!*



Gerten's Fundraiser Grows!

It doesn't seem too long ago when we were unloading a large truck full of Gerten's flowers. And now we're pulling out our snow scrapers and turning up the furnace!

Many thanks to everyone who purchased flowers during our annual Gerten's Fundraiser! This year, we raised almost \$9,500 worth of flowers. This fundraiser continues to grow, ever since we began in 2013. Since then, our orders have doubled!

This would not be possible without the generous support of many Phoenix family members, partners, and staff. A special thank you goes out to The National Handicapped Housing Institute, Wilson Tool International, Gerry's Fire and Safety, and Lynne Megan, all who placed exceptionally large orders. This year's proceeds benefited our homes directly, raising funds for community fun, music therapy, supplies for the garden, and a wheelchair-accessible swing.

*Thank you to all who participated in our Gerten's Fundraiser this year!
We look forward to seeing you next year!*

Want to Spruce Up Your Lawn?

Promote The Phoenix Residence this spring as the shop for all your planting needs! And don't forget, it's never too early to start planning for Mother's Day!

Orders for the 2018 season will be available as soon as March, with delivery in May. Please contact Jackie Larson at 651-294-7964 or jl Larson@phoenixresidence.org for more information.



 **Gerten's**
FUNDRAISING



*Donations listed are from
January 1 – December 31, 2016*

List of Donations

General Donations

Over \$5,000

John and Colleen French

\$2,500-\$5,000

CBS Construction

David and Lynn Myhr

Eric and Mary Claire Schultz

Geritom Medical, Inc.

John and Shirley Myers

South Robert Street Business
Association

\$1,000-\$2,499

Anchor Bank

Carlson Advisors

CBL Floors

Cummings Mobility

Darlene Scott

Derrick Banks

Family of Paul Dwyer

Jamie Grupe

John Kuhrmeyer/AXA Advisors

John's ProCare

K & L Building and Remodeling

Lunds & Byerlys

Mary Ann Corbey

Mary Jo Bailey

McKesson Medical

Minnesota Coaches, Inc.

NFP Corporate Services

Steve and Lou Pfeiffer

Tom and Mary Deeney

Wilson Tool International

\$500-\$999

Alex Lape

Bud and Shirley Bergquist

Canopy Financial Group

Carlson Advisors

Ecolab Foundation

Innovative Office Solutions

Jeff Schmitt

Lynne Megan

Mary Moran

New Park Lions Club, Inc.

Paul Borchert

Ultimate Fleet Repair

\$100-\$499

Alan Berner

American Family Insurance

Barb Husaby

Barb Magnuson

Becky Butler

Bell State Bank & Trust

Brown & Brown

Bruce Singer

Business Telephone Products

Carlton Insurance Marketing

County Line Iron, Inc.

Dakota Electric Association

Dan Lippert

D'Ann Becker

Darin Husaby

Darwin and Jerlyn Missling

David and Donna Madera

\$100-\$499

Deb Malmo

Diane Kubal

Duane Harves

Elizabeth and Gregory Severson

Entira Family Clinic

Frank and Diane Hanzal

Gail and Steven Severson

Gina Aasen

Grant Barrette

Handi Medical Supply

Ivan Johnson

Janice Schneider

Jean and Arlen Comfort

Jennifer King-Ellis

Jennifer Buchanan

Joan Wilhelmy

John and Peggy Thomas

John and Sherry Jackson

John Nicholson

Josephine Bredesen

Julie Perlinger

Karen and David Olson

Karen Steiner

Katherine Dwyer

Keenan Raverty

Ken Ward

Kirsten Gregerson

Larry Luck

Larry Quist

Laurie and Michael Udenberg

Laurie Sicora

Leeann Leitch



List of Donations

Donations listed are from
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General Donations

\$100-\$499

Lions Club
Liz McCambridge
Maggie Klaassens
Mariann Jackson
Mark and Kim Calhoun
Mary Thirsten
Mary Vilmur
Michael Sir
Midwest Special Services
Mona Strom
NewTrax, Inc.
OTT, Inc.
Park-Port Lioness Club
Pat Burns
Pat Casey
Patricia and Neil Smith
Paul and Ellen Wilson
Paul and Sharon Severson
Paul Coons
Randy and Paulene Roering
Reliable Medical Supply
Richard Ivance
Rick Constantine
Rose and Norman Joarnt
Roxanne Kasal
Selective Insurance Company
Sharon Constantine
Shelley Peltier
St. Paul Park-Newport
Susan Johnson
The Canopy Group

\$100-\$499

The Sportsman Guide
Thomas Cherry
Tim Odell
Tin Man Investments/
James and Amy Crews
Tina Sharbona
Tom Engels
Tom Hollander
Tom Severson
Twin City Janitorial Supply
Vadnais Heights Lions Club
Walter and Susanne Bonfe
Wendy Wilhelmy
Western National Mutual
Insurance Company

Up to \$99

Alvin King
Angela Price
Ann Honkala
Anne and Pierre Lagrandeur
Audrey Myhr
Barb Schmitz
Ben Pierce
Bill and Sandy Husaby
Casey Wilson
Cathleen Darby
Cheryl and Steve Moore
Cheryl and Lyle Chacka
Chris and Duane Berg
Chris and Steve Barrett

Up to \$99

Dan and Deanna Roering
David and Diane Brass
David Douglas
Diane Berg
Dominic and Lindsey Hartjes
Edward and Andrea Chromey
Elisabeth and Christopher McSherry
Ellen Duncanson
Fran and Linda Pierce
Frances Manderson
Gail Hassler
Gene and Florance Engelbrecht
Geoff and Kaylene Roering
Ginny Mackenzie
Heidi Flaten
James and Angela Goodrick
James and Judith Sturm
Jamie Berner
Jason Kohout
Jason Zachariason
JJ's Industrial Painting, Inc.
Jo Ellen Duncanson
Joan and David Sloop
Joanna Hahn
Joanne and Craig Swanson
Jody Curl
John and Nancy Orme
Jonathan Borchardt
Justin Roering
Kim Finnerud
Mae Etta Jarvis
Mark and Jacquelyn Braun



List of Donations

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General Donations

Up to \$99

Matt and Jenna Severson
Matthew Pierce
Meridel Tobias
Michael and Charlotte Montag
Michael and Jean Doran
Pam Kranz
Pat Callinan
Patricia and Richard Coan
Queen Esther Chapter 26
Rachel Koenigs
Richard and Catherine
Ehrmanntraut
Robert and Marie Murphy
Robert and Sharon Thibault
Rose Hughes
Sarah Dearhamer
Shaun Volkman
Success Computer Consulting
Terry and Janet Cavegn
Tim Egan
Warren and Sharon Sudmeier
Workers' Compensation
Modifier Controllers, Inc.
Wendy Price

In-Kind Donations

A. Johnson & Sons
Abdallah Chocolates
Acme Comedy Company
Alexis Bailly Winery
Anoka County Parks and
Recreation

In-Kind Donations

B52 Burgers and Brew
Batteries Plus
Bernie and Buzz Lortis
Black Bear Resort and Casino
Bluestone Physician Services
Bowlero
Brave New Workshop
Breadsmith
Cafe Latte
Cannon River Winery
Carol Olson
Chanhassen Dinner Theater
Color Me Mine
ComedySportz
Comfort Suites of Canal Park
Commercial Steam
Clean Company
Darlene Scott
Diane Berg
Downtowner Car Wash
Festival Foods
Fireside Lounge
Gerten's Greenhouse and
Garden Center
Grandma's Restaurant
Company
Great Lakes Aquarium
Great Waters Brewery
Guthrie Theater
History Theatre
House of Comedy

Ichiban Japanese Steak House &
Sushi Bar
Innovative Office Solutions
Izzy's Ice Cream Cafe
Joe Mauer
Kim Finnerud
Lifetouch, Inc.
Lisa Brown
Lucky's Custom Fishing Rods
Mama's Pizza
Mancini's Char House
Mary Thirsten
Massage Envy
McGarry's Pub
Metro Sales
Mill City Museum
Minnesota Landscape Arboretum
Minnesota SEA LIFE
Minnesota State Fair
Oak Marsh Golf Course
Old Log Theatre
Ordway Center for
Performing Arts
Pam Connolly
Panera Bread
Pat Burns
Pat Callinan
Paul and Sharon Severson
Prairie's Edge Casino Resort
Punch Pizza
Ramsey County
Reliable Medical Supply

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



*Donations listed are from
January 1 – December 31, 2016*

List of Donations

In-Kind Donations

Rocco Altobelli
Ruttger's Bay Lake Lodge
Seven Clans Casino
St. Paul Chamber Orchestra
St. Paul Harley-Davidson
St. Paul Saints Baseball
Stages Theatre Company
Steve Pfeiffer
Surly Brewing Company
Tamarack Tap Room
The Cellars Wine & Spirits
Total Wine & More
Vertical Endeavors
Walker Art Center
Weisman Art Museum
Wendy Price
Wild Mountain Taylors Falls
Recreation
Wine & Canvas
Wuollet Bakery

Grants

Hubbard Broadcasting Foundation

Memorials and Honorariums

In Memory of Kirsten Shifsky

Barbara Husaby
Christopher and Elisabeth McSherry
Darlene Scott
Diane Berg
Joan Wilhelmy
Jody Curl
Mary Thirsten
Michael and Charlotte Montag
Michael and Jean Doran
Richard and Catherine Ehrmanntraut
Rose Hughes
Susan Johnson
Walter and Susanne Bonfe
Wendy Price
Wendy Wilhelmy

In Memory of Robert Dunnigan

James and Judith Sturm
John and Nancy Orme
Mary Thirsten
Patricia and Richard Coan

In Memory of Wendy Severson

Tom Severson

In Memory of Don Bond

Jean and Arlen Comfort

In Memory of Nancy Hooker

Darlene Scott

In Memory of Mark Wagner

Becky Butler

In Memory of Stephen Lape

Alex Lape
Anne and Pierre Lagrandeur
Darlene Scott
David and Diane Brass
David Douglas
Edward and Andrea Chromey
Frances Manderson
Larry Luck
Mariann Jackson
Mary Ann Corbey
Mary Thirsten
Robert and Marie Murphy
Robert and Sharon Thibault

In Memory of Dale Bergquist

Bud and Shirley Bergquist
Ginny Mackenzie
Pat Callinan
Warren and Sharon Sudmeier

In Memory of Robert & Antoinette Lippert

Dan Lippert

In Honor of Laura Quist

Ben Pierce
Fran and Linda Pierce
Joanna Hahn
Maggie Klaassens
Matthew Pierce

Memorials and Honorariums

In Memory of Daniel Ehlenz

D'Ann Becker

In Memory of Eric Lofgren

Joan and David Sloop



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Financials

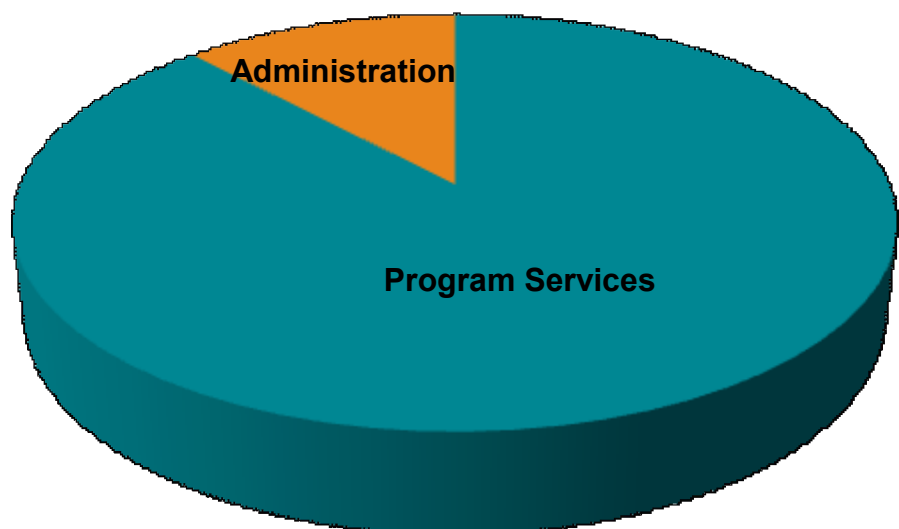
Statement of Financial Position

Statement of Activities

<i>Assets</i>	<i>2016</i>	<i>2015</i>	<i>Revenue & Support</i>	<i>2016</i>	<i>2015</i>
Cash	\$616,854	\$741,428	Program Services	\$10,562,556	\$10,495,692
Accounts Receivable	\$942,896	\$869,612	Donations & Special Events	\$126,412	\$276,189
Property & Equipment	\$6,607,777	\$6,776,152	Interest & Other	\$35,599	\$7,461
Other	\$31,000	\$41,750	Total Revenue	\$10,724,567	\$10,779,342
Total Assets	\$8,198,527	\$8,428,942			
			<i>Expenses</i>		
<i>Liabilities and Net Assets</i>			Program Services	\$9,043,747	\$8,906,637
Current Liabilities	\$587,600	\$779,425	Administrative Expense	\$1,153,779	\$1,143,384
Long-Term Debt	\$191,461	\$730,313	Fundraising	\$26,779	\$24,083
Total Liabilities	\$779,061	\$1,509,738	Total Expenses	\$10,224,305	\$10,074,104
			Change in Net Assets	\$500,262	\$705,238
<i>Net Assets</i>					
Unrestricted	\$7,084,908	\$6,645,219			
Temporarily Restricted	\$334,558	\$273,985			
Total Liabilities and Net Assets	\$8,198,527	\$8,428,942			

2016 Expenses

88% Program Services
12% Administration





Board of Directors

Richard J. Ivance, M.D. Chairman	Derrick Banks Director
Kirsten Gregerson Director	Jennifer Buchanan Director
James Hughes Treasurer	Garrett Colao Director
Steve Pfeiffer Vice Chair	Jeffrey S. Points Director
Eric Schultz Director	Julie N. Nagorski Director
Jean Schmidt Secretary	Jamie Grupe Director
Darlene Scott President/CEO	Edward G. Gutzmann Director

Contact Information

The Phoenix Residence, Inc.

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