

# THE PHOENIX RESIDENCE ANNUAL REPORT 2012

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Message from the President ~ Celebrating Successes and Soaring Beyond Possibilities!

Clearly, Phoenix is distinctly different from other providers. It is a family-focused organization; it embraces consumers and strives to provide an experience that transcends ordinary. Margret's dream realized through the lives of individuals supported by Phoenix whether in a residential home, community, or their place of employment. Our founder, a mother of a son with disabilities, could only imagine the life she desired for her son John nearly 36 years ago. Today, Phoenix through its partnerships with individuals and their families have helped people to live a life of their choice and to **soar beyond** what many thought was impossible.

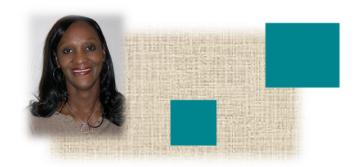
Michael Fournelle, a client of Phoenix for over 30 years, is one shining example of someone who has lived a life much different than he and his family could imagine. Mike met and married his wife at a Phoenix home, has held a job for over 30 years, enjoys going out to the theater, eating out at some of the most extravagant restaurants in Minnesota, and he is an avid sports fan. You could say that Mike is simply an all American guy. He loves a cold glass a beer and no one can advocate better for Mike than he does for himself. Mike is a self-advocate and was self-employed as an Avon representative. He is truly living the life of his choice. He has developed many great and lasting relationships; some with staff that he has known for over 30 years.

Longevity and sustainability have merit! In the world of health and human services where over 40% turnover rates are typical, Phoenix turnover rate is half the industry average. We are proud to say the majority of people Phoenix employs have remained at Phoenix 5 years or longer. In an annual survey of employees, their satisfaction is apparent with numerous comments such as "Phoenix is a great place to work and Phoenix cares about its employees. The leadership team of Phoenix can pat themselves on the back for the high ratings of its employees. The important news is satisfied employees equates to satisfied consumers. It is a known fact when people are happy in their work environment they perform better than those who are not happy.

Customer service is always a priority at Phoenix! Our focus is on individualized services. We understand that quality is the perception of the recipient of service; therefore it is in the eye of the beholder. Phoenix is committed to person centered services, respecting and valuing relationships. Turnover is costly and has an impact on quality. We will continue to aim at lowering employee turnover as a means of promoting quality and enhanced consumer relations. In addition to the over 5-year employees, Phoenix has 41 employees with 10 or more years of service and 22 employees with 20 or more years of service.

**Diane Berg** of English House, **Liz Smith**, of Clinton House and **Pat Callinan**, Staff Development Director are all are employees that are in the Phoenix 30 year Hall of Fame.

Darlene Scott
CEO/President
May 2013





### Phoenix Strategic Goals and Vision

- To provide quality residential community and programmatic services with opportunities for personal growth for all individuals supported by Phoenix.
- To enhance our financial resources to provide optimal services and supports.
- To promote continuous quality improvement in all aspects of service and operations.
- To provide an optimal benefit package defined by our employees and financial resources in order to recruit and retain quality employees
- To provide superior communication and information systems that will enhance work processes and customer service.

#### WE SEE A FUTURE WHERE:

- Individuals that we support have the opportunity to participate in and contribute to their communities so that they can enjoy full rights of full citizenship;
- Choice is a right and it belongs to the person;
- > All Services and programs are Person Centered.
- All Services and supports are provided by a well-trained and adequately compensated workforce;
- Individuals that we support maintain and or establish relationships with family, friends and others in their circle of natural support;
- Innovations through technology are used to enhance the lives of individuals with disabilities.
- > Employment first principles.









### Enhancing Value through Leadership

The Phoenix Residence soars beyond possibilities with over a century of leadership experience at its corporate office and it continues to enhance its depth by developing new leaders and creating new opportunities.

The Phoenix Residence honored ten community partners at the 14th Annual Russ Douglas Phoenix Golf Classic who has helped us *Soar Beyond Possibilities*. The honorees are:

ROB BORCHARDT
DR. DAVID ROSSMILLER
GREG ROBECK
MARY JANE MORRISON
LOUISE DAVIDSON
JOHN KUHRMEYER
STEPHEN LAPE
DIANE BERG
LIBBY JOHNSON
ERIC SCHULTZ

Alan Berner, Vice President of Community Services is the newest member of our administrative team. Alan is not new to Phoenix; he has served in various leadership roles over the last six years. Alan oversees residential & community services as well as development of new services and assistive technology initiatives. Rachel Koenigs joined the Phoenix team as our first ever Public Relations & Development Coordinator. Rachel hit the ground running and is taking the lead on all public communications and special event planning. Last but not least, our outstanding office manager, Samantha Rea. She worked at Douglas House as a Support Professional before assuming the new position at the central office. All of these individuals are certainly making their mark in our soaring beyond possibilities footprint.



### Residential and Non-Residential Services

#### INDIVIDUALS AND NEW TECHNOLOGY

In the last couple of years, we have experienced significant growth in the interest and the frequency with our clients utilizing various technologies in their daily lives. This can be through using various devices allowing better control of their environment, communication systems, or simply to provide entertainment.

Control over a person's environment can be challenging if you're not able to reach out and turn devices on/off, such as a television. Several new technologies have been introduced at Phoenix to assist individuals in this area. The first is a voice activated remote currently being used by Greg at Carver and soon to be used by Ted at English. The device is great for both individuals as it has the ability to be trained to their particular speaking styles. With the device they are able to fully control their TVs – in the past individuals had to rely on staff support whenever changing the channel or adjusting the volume. The addition of this device has been a huge change in Greg's daily life and we expect the same for Ted.

In the last couple of years, we have seen an increase in individuals using personal music devices, laptops, and tablets. With using these devices, our clients are able to interact with their communities and the world much in the same way we do. They access news on the internet, send emails, listen to music, and use Facebook. To help support individuals gain access to computers, we have been offering the opportunity to obtain computers from our organization. Several of our clients have been able to receive a computer which can be a challenge for them to purchase on their own.

Lastly, communication devices continue to make great strides. In addition to increased functionality from traditional speech device developers, individuals have been using mainstream technology to support their communication needs. At Carver, we have an individual using an application he purchased for his tablet to assist with communicating with others. We expect this trend to continue as speech device developers continue to find ways to utilize mainstream technology to support individuals who need assistance with communicating.

The Phoenix Residence has experienced many changes in our use of technology as an organization both in our work practices and with the clients we serve. With the prevalence of technology in today's society, we only expect for our use and the use of the individuals we serve to grow.









#### PARTNERSHIP WITH PHOENIX SERVICES CORPORATION

The Phoenix Residence continues to partner with Phoenix Service Corporation (PSC) to provide many outstanding services to our clients. PSC is a non-profit certified rehabilitation agency serving adults with disabilities for over twenty years. PSC provides consultant rehabilitation services as well as targeted case management, housing access, transitional services, supported employment, and independent living services. Many of the staff members of PSC have years of experience serving individuals with developmental and/or physical disabilities.

PSC is able to provide the necessary services for our clients, not offered through The Phoenix Residence. For example, if an individual is looking for housing, PSC can assist with securing affordable, accessible housing. The overall approach of Phoenix Service Corporation is individual person centered – the first step is to listen with an open mind to the needs of the individual – the same focus as The Phoenix Residence. PSC is focused with providing the services around the needs of a specific person than creating a model – hence a one-size-fits-all approach does not work.





### Technology Trends

#### **WORKING SMARTER AT PRI**

Recently, The Phoenix Residence, Inc. has been updating and adding new technologies to help us accomplish more with the funds that we have available. We have added an electronic time clock system, an online payroll system, a scheduling system, as well as updates to our web site. We are very excited to have these tools in place and we have already recognized the many benefits.

We have partnered with Payroll Control Systems (PCS) for our time clock and payroll systems. This allows us to process payroll more efficiently and accurately. In addition, this has freed up time for management to focus on other tasks and projects at the houses. This has decreased mileage reimbursement expenses as well as the wear-and-tear on staff vehicles. PCS has been a wonderful partner and have been very supportive of PRI with a donation for our Russ Douglas Phoenix Golf Classic.

We have also added the ability for employees to receive their paychecks in the form of a Pay Card. This has saved employees check cashing fees and is an alternative to a traditional bank. Pay Card has been a popular option for employees and The Phoenix Residence is happy to provide our employees with more choice and flexibility in receiving their pay.

Most recently, The Phoenix Residence has rolled out a new scheduling system. Ready Set Work is a fairly new online scheduling program allowing managers to schedule employees and see where and when employees are working in real-time. This program also allows employees to switch shifts, request vacations, and find coverage by using the web page, email, or even by using text messages. Managers and employees no longer have to spend hours on the phone trying to switch shifts, cover a vacation, or to cover a call-in – the system does it automatically. Although we are in the beginning stages of using Ready Set Work, we are excited about the possibilities it provides and expect it to be a handy tool to reduce overtime costs and better coordinate schedules.





#### PHOENIX ON THE WEB

Have you had the chance to check out our updated website? If you have not had the chance, go to <a href="https://www.phoenixresidence.org">www.phoenixresidence.org</a> and check out the new look. We partnered with Plaudit Design to create a functional website and admin tool allowing us to communicate important information often to our followers of The Phoenix Residence. Our team is constantly adding new information which will increase site traffic and visibility. Information from events, activities, and accomplishments about staff and clients are added daily. We are also increasing our presence in social media - check out our Facebook and Twitter pages.

It's been an exciting time here at The Phoenix Residence and we are excited to see what the future brings. From adaptive and assistive technologies that will help the individuals we serve become more independent to the wonderful interactions we are able to have via social media – we have a lot to be excited about. We are committed to utilizing the technology and tools available to us to provide exceptional service and help us SOAR BEYOND POSSIBILITIES!

#### HEALTH SERVICES STAYING CONNECTED THROUGH USE OF TECHNOLOGY

Our nursing team has been embracing technology with great satisfaction with the implementation and usage of Therap Services, electronic documentation. The nurses have moved a majority of the "paper medical charting practices" to the electronic system including medication administration, record documentation, and many monitoring systems. Therap also allows for secured communication with staff and family. Nurses are able to view and update the program with ease and efficiency, providing real-time updates to the Phoenix Residence team caring for the individual. This has helped our organization facilitate better, cohesive care.

Many of the individuals attend clinics that have web-based charting systems, such as Entira Family Clinic Patient Portal or Health Partners MyChart. The nurse is able to communicate with the physician utilizing this system. This has greatly reduced the number of phone calls and faxes to the clinics; resulting in reduced stress on the nurse and the physician. More importantly, we are experiencing quicker implementation for referrals, increased consistency with records, such as lab results, physician updates, and medication management. It also eliminates any confusion on the intended message.

County case workers, family members, and day programs are using secured electronic e-mails to send messages. Teams are able to communicate "all-in-one" message as well. The day of using USPS with sending three copies of the same information is behind us. We welcome point, click, and send!



### Philanthropy Efforts

#### MADE IN THE SHADE

This past year, The Phoenix Residence participated in the Made in the Shade fundraiser. Made in the Shade is a non-competitive run, walk, and roll event to raise funds for non-profit agencies serving people with disabilities. Staff, family members, and clients received sponsorships and pledges prior the event to raise money.

The event was held at Thomas Beach on Lake Calhoun on September 21 and Phoenix raised over \$10,000. Several Phoenix staff members, family members, and clients laced up their shoes, tuned up their bikes, wheelchairs, and strollers and cruised around Lake Calhoun. Following the walk, lunch and entertainment was provided.

The houses who participated in the event raised funds for their houses. English, Centerville, and Janet Court locations used their funds for music therapy. The music therapist visits the houses twice a month and involves individuals in song, using percussion instruments. Other purchases include a Wii system for the Viking House – House Manager Pam noted the clients love the games and the house is filled laughter! Western house purchased a 46" flat screen TV – they feel like they are in the movie theater!





#### **CEILING LIFTS COMING TO FOSS HOUSE!**

In early 2013, we received a generous donation from the Deeney family after the passing of Gerald Deeney. Over the years, Gerald Deeney has supported the work and services provided by The Phoenix Residence. To best utilize his gift, we installed a ceiling lift system at the Foss house where his daughter Barb resides.

Our homes solely rely on floor lifts for our transferring needs which can be a challenge to navigate. The ceiling lift system, which uses tracking are installed in two of the bedrooms, both bathrooms, and the seating area of the living room. The added ease and flexibility for individuals to transfer in-and-out of their wheelchairs is an exceptional benefit to everyone at Foss.

Without the financial support from the Deeney family, the purchase of this system would have not been possible. The Phoenix Residence would like to sincerely thank the Gerald Deeney family for their support over the years.. We certainly welcome those who would like to see the ceiling lift and the difference it's making in lives of the individuals who live at the Foss house.

#### GERTENS GREENHOUSES ANNUAL FUNDRAISER

This past year, The Phoenix Residence participated in the Gertens Greenhouse fundraiser. The English House was the first house to test the waters and was very successful! With selling over \$3000 in plants and Gertens Gift Cards, the English House was able to attend several outings and events with clients. We plan on expanding the Gertens fundraiser to all houses. We are excited for each house to participate in this fundraiser — each house is able to keep the funds raised.





### 13<sup>TH</sup> ANNUAL RUSS DOUGLAS PHOENIX GOLF CLASSIC

The mission and goal of the Russ Douglas Phoenix Golf Classic continues to be met year after year, earning over \$40,000 this past year. This past year, the event was held at the River Oaks Golf Course in Cottage Grove.

The success from this event allows us to continue to strive to help the individuals we serve. Thank you to all who make this event such a success – we truly could not have done without your dedication and hard work. A sincere thank you to our Specials Events Committee who assist us in planning the event months in advance; David Douglas, Steve Pfeiffer, and John Kuhrmeyer. Also a big thank you to our 3M volunteers and the many Phoenix staff members who assist with the event the entire day.

#### THANK YOU TO OUR 2012 MAJOR SPONSORS

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### Community Engagement

#### **PRI CARES**

Here at The Phoenix Residence, Inc. we wanted to do something that would show our employees that we really care about them. We also knew that the employees here are wonderful people that help each other out whenever they can. We came up with the idea of coordinating a number of "Phoenix Cares Drives" throughout the year. We have had the opportunity to host three Phoenix Cares Drives; a winter clothing drive, a school supply drive, and a holiday gift drive. The drives are coordinated by Phoenix and supported by all of the employees. We announce a Phoenix Cares Drive and let everyone know what we are looking to accomplish. For example, the holiday gift drive we reached out to employees and asked if there was anyone who was in need of receiving a gift for their children over the holidays. Once we received requests, we created a giving tree with items listed on ornaments. Employees were able to participate if they wanted to and it came as no surprise that there was a lot of interest. Many people offered to purchase gifts and we were able to help make the holidays brighter for more than 60 children. The caring nature of our co-workers has been put on full display and we have been able to help each other in very meaningful ways. We look forward to having many more Phoenix Cares Drives in the future. If you are interested in contributing to upcoming drives, contact Michael Jenson in Human Resources at 651-294-7960.

#### **EMPLOYEE NIGHT OUT**

As a committee, we have been coming up with ideas to better serve our "Phoenix Family." With the rising cost of gas and groceries, we wanted to offer free child care for an evening for our employees. Also knowing many employees would enjoy an "evening out" without having to worry about their children. The Phoenix Residence administrative staff offered an evening of free childcare at the Central Office. Several families took advantage of this opportunity.

During the evening, we offered healthy snacks, art projects, watched a movie, and facilitated games. The older children helped take care of the younger children...it was a pleasure to see. It was a fun evening meeting, spending time with, and getting to know our "Phoenix Family" better. We look forward to hosting another event in the near future.









#### **DOROTHY DAY CENTER**

The Phoenix Residence Central Office staff enjoyed an afternoon of serving meals at the Dorothy Day Center, located in Downtown St. Paul, this past February. The Dorothy Day Center provides hot meals served by volunteers and also provides other services to those who are experiencing homelessness in the Twin Cities area. During the lunch hour we served hundreds of people. Those receiving lunch were extremely grateful and it was a truly rewarding experience.

#### FEED MY STAVING CHILDREN

This past winter, The Phoenix Residence staff, along with family members and clients, packed meals at Feed My Starving Children. Feed My Starving Children is a non-profit Christian organization committed to feeding starving children around the globe. The success of the organization is due to its fun and easy approach; volunteers pack meals formulated by food scientists for starving children. Once the meals are packed, they're sealed, boxed and stacked on pallets ready for shipment. FMSC sends meals all over the world, including El Salvador, Haiti, and Nicaragua, to name just a few. We learned how our 2 hours of effort can change the lives of hundreds of children. At the end of the day, we were able to feed many children for one full year! It was truly an amazing experience.

#### WILSON TOOL ANNUAL PICNIC

For the past 15 years, the English house has been volunteering at the Wilson Tool annual picnic. Wilson Tool, located in Hugo is a manufacturer of tooling systems for the stamping industry and a huge supporter of The Phoenix Residence.

Diane Berg, Program Manager responsible for securing volunteers, was able to coordinate 35 people to work at the various booths. Their hard work paid off, earning \$1,800! The funds were then used to take individuals on multiple trips, such as Branson, Iowa, and Wisconsin.







### Legislative Advocacy

#### ARRM DAY AT THE CAPITAL

This past year at the state capital was certainly interesting and had its ups and downs. We started the 2013 legislative session with ARRM Day at the Capital. Despite the snowy day, ARRM Day was a success. Many partnering organizations battled the roads and were present to support the mission of ARRM, the proposed cost of living adjustment (COLA), and the core services we provide for people with disabilities. Phoenix was represented by many staff members as well as clients and family members.

Phoenix staff members had the opportunity to meet with several state representatives and senators to discuss the importance of our provided services and immediate need of passing the COLA.

During the rally, held at the Capitol Rotunda, Governor Dayton and other state officials spoke in support of the COLA and the quality care organizations like Phoenix provide for Minnesotans with disabilities. Darlene Scott also gave a motivational message during the rally in her support of the COLA.

Unfortunately, the COLA was passed at a significantly lower percentage than proposed; passing only a 1% increase. It is imperative to contact local elected officials and legislators regarding how we need their support once legislature is back in session. To contact your state representative or senator, go to www.leg.state.mn.us.





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THANK YOU TO OUR DONORS, STAFF, VOLUNTEERS AND BUSINESS PARTNERS WHO CONTRIBUTED TO OUR SUCCESS IN 2012



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### In Memory of Doug Altendorfer

**MARY THIRSTEN** 

#### In Memory of Ariel Sookdeo

TODD AND JAN ASCHOFF
KIM JOHNSON-CALHOUN
R. INSERRA
JAMES AND SHARON KORAN
ARLENE AND MARK NIEMI
THERESE OBRIEN
JAMES AND WENDY SUTTON
MARY THIRSTEN

### In Memory of Ruda Hanson GAYLE STEINER

In Memory of Ray W. Chamberlain ANNA CHAMBERLAIN



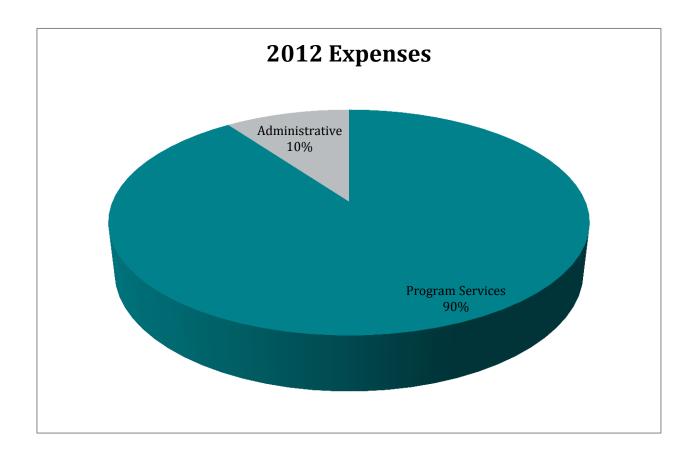
### Financials

# STATEMENT OF FINANCIAL POSTION

# STATEMENT OF ACTIVITIES

Assets	2012	2011	Revenue & Support	2012	2011
Cash	\$1,419,421	\$1,630,660	Program Services	\$9,163,930	\$9,078,765
Accounts Receivable	\$816,759	\$747,937	Donations & Special Events	\$88,858	\$118,536
Property & Equipment	\$6,363,562	\$6,403,809	Interest & Other	\$7,396	\$9,033
Other	\$131,902	\$132,797	Total Revenue	\$9,260,184	\$9,206,334
Total Assets	\$8,731,644	\$8,915,203			
			Expense		
Liabilities and Net Assets			Program Services	\$8,021,135	\$7,901,680
Current Liabilities	\$890,872	\$825,712	Administrative Expense	\$865,124	\$874,452
Long-Term Debt	\$2,341,719	\$2,948,768	Fundraising	\$15,596	\$14,893
<b>Total Liabilities</b>	\$3,232,591	\$3,774,480	<b>Total Expenses</b>	\$8,901,855	\$8,791,025
Net Assets			Change in Net Assets	\$358,329	\$415,309
Unrestricted	\$5,195,058	\$4,875,005			
Temporarily Restricted	\$303,995	\$265,718			
Total Liabilities and Net Assets	\$8,731,644	\$8,915,203			







### **Board of Directors**

### THE PHOENIX RESIDENCE 2012 BOARD OF DIRECTORS

Mary Jo Bailey ~ Director

Derrick Banks ~ Director

Paul Coons ~ Director

Edward G. Gutzmann ~ Vice Chair

Dr. Richard J. Ivance ~ Chair

Kirsten Gregerson ~ Secretary

Steve Pfeiffer ~ Treasurer

Eric Schultz ~ Past Chair

Jean Schmidt ~ Director

Darlene Scott ~ President/CEO



### Company Information

The Phoenix Residence, Inc. (PRI) was incorporated August 2 1974 and opened in October 1977 as a private, non-profit facility for adults with developmental and physical disabilities. Phoenix was created as a community alternative to Regional Treatment Centers. A group of parents seeking a better life for their grown children were the pioneers that led the way for PRI. The original flagship facility served 5 I clients that required an accessible barrier free living environment. Individuals had a spectrum of cognitive abilities ranging from borderline to profound intellectual challenges. Most, if not all, individuals that resided at PRI were totally physically disabled and required personal support to assist with all activities of daily living. Many individuals were also considered medically fragile.

The Phoenix Residence, Inc. combined residential and Day Program services at the same location until about 1990 when a separate corporation was developed to provide Day Program Services. The sister corporation Phoenix Service Corporation (PSC) was also developed in 1990. PSC is certified as a Rehabilitation Agency.

Phoenix expanded its services to Home and Community Based Services in the late 80's and continued on this path with seeking approval from the Department of Human Services in 2003 to relocate individuals from the 51 bed facility to small 6-bedroom homes in communities near family and friends. The relocation project was successful with the final home opening in 2005.

PRI sold the original facility located at 135 Colorado St. East in 2008 and moved to its new corporate office at 330 Marie Ave East in West Saint Paul Minnesota.

The Phoenix Residence, Inc. 330 Marie Avenue, East Tel 651-227-7655

Fax 651-227-6847

www.phoenixresidence.org

