



2022 Annual Report



The Year of Resilience

Soaring Beyond Possibilities

Life Moving Forward



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Key Staff

President & CEO

Darlene Scott

Vice President of Operations

Mary Thirsten

Vice President of Community Services

Alan Berner

Vice President of Financial Services

Pam Connolly

Director of Nursing

Brandi Sterry

Director of Community Services

Megan Avakian

Community Support Service Coordinator

Elizabeth Larson

Services

Phoenix provides support to adults with disabilities living in residential and nonresidential settings, helping them remain independent and active in their own community.



From left to right: *Rabecca Edstom from Centerville House, Joell Podolan from Furness House, and Kathleen Owens and Curtis Anderson from Ludden House*

Message from President

Resilience is a word I learned early in life after my mother's accident. My family went through some tough times and had to overcome them to survive! That is what comes to mind regarding The Phoenix Residence, Inc (PRI) and Phoenix Service Corporation (PSC), our sister corporation. In 1990, we established a new nonprofit corporation to provide rehabilitation services for persons with intellectual and developmental disabilities. Both organizations serve persons with disabilities and have been *Resilient* in making the necessary changes to adapt to environmental and service changes over the last 33 years for PSC and nearly 50 years for PRI.



Phoenix has overcome a lot of turbulence over the years, but the last three years have helped build our muscle strength and helped us to rely on each other even more. We help people live their best lives in the homes of their choice and maintain their independence. The Phoenix Residence continues to focus on providing residential support, while PSC has evolved to assist people through case management services, housing stabilization, housing supports, relocation service coordination, and transitional services. We have formed a strong partnership in providing a variety of services.

We look forward to continuing to work together and adding to the array of services under the Phoenix umbrella. We thank you for your ongoing support as we focus on the future!

Darlene M. Scott

Darlene Scott
President & CEO
The Phoenix Residence &
Phoenix Service Corporation



Above: Gail Sherseith and Sandy Calhoun from English House. We lost our beloved Sandy this year!



Left: Jackie Fritsch from Carver House with Program Manager George Winston

Reestablishing Ourselves in the Community

When the National Emergency declaration expired this past spring, we quickly recognized the impacts the workforce shortage had not only on our ability to complete our work, but we also needed to find a way to support the people in our homes in returning to a normal life in the community.

It's so important for the individuals we support to get out and do the things that are important to them or be able to do fun things at home. As an organization, this is something we value and have invested considerable energy into making it a routine part of what we do.

This has been a significant challenge post-COVID, but we're working on it one person at a time. Since the beginning of 2023, we have seen many great activities and creative approaches being deployed by our teams in getting people out and about. Our Appointment Coordinators have jumped in and invested their time to help coordinate these activities, and we look forward to working with our new Activity Coordinators who recently started.

Our managers and staff have also helped plan fun activities in the community, with trips to Monster Jam, the movies, restaurants, and Twins games, among other activities.

But we can't forget the efforts of so many family members who have invested their resources and time to help in the homes, with cooking dinner, taking people out into the community, etc. You've made a tremendous difference in the lives of your loved ones, and we can't thank you enough! Thank you for making these valuable opportunities happen while we continue to rebuild our capacity, so we can return to the level we were at pre-COVID.

Our workforce challenges still exist and we expect this will be our reality for the foreseeable future. But we are committed to finding a way to make meaningful community activities a routine thing for everyone at Phoenix, and we will continue to develop new approaches and resources to help meet that goal. We appreciate the efforts of so many, and we're looking forward to seeing ourselves grow in the weeks and months to come.



*Alan Berner
Vice President of Community Services*



*Ludden House at the
Minnesota Zoo*

Fundraising & Events

The joy on their faces shined through as we embraced old friends we hadn't seen in so long! The buzz, excitement, and camaraderie at our 2022 fundraisers was incredible! For the first time in two years, we held all three fundraisers in-person—and it was certainly memorable!

For many, they hadn't seen their friends since the 2019 Made in the Shade 5K Walk—and it showed! We had a record number of homes show up for the event—11 of our 19 homes participated with some bringing family members as well. Thank you to everyone who came out to the lake!

And the 2022 Russ Douglas Phoenix Golf Classic allowed us to mingle and socialize again! Due to the winding down of COVID, we held a limited tournament of golfing only. But it was evident that everyone was happy to be back, despite the restrictions.

Fortunately, our Gertens Plant Sale still bloomed without any set backs or restrictions.

Thank you to all our sponsors and donors! You all showed up when we needed you—and for that, we couldn't be more grateful! Thank for your support!



Top: Sue Foss from Foss House with then Assistant Program Director Agye Agyeman-Prempeh at Made in the Shade

FUNDRAISING TOTALS

\$36,461 from Russ Douglas Phoenix Golf Classic

\$14,895 from Made in the Shade 5K Walk, Run & Roll

\$4,991 from Gertens Plant Sale

\$215,179 from *Close the Gap* Campaign

Major Sponsors

Russ Douglas Phoenix Golf Classic

Platinum:

Geritom Medical
South Robert Street Business Association
Tom Cherry and Darlene Hafner

Gold:

Anonymous
David and Lynn Myhr
John's ProCare
K&L Building and Remodeling
Minnesota Coaches
NFP Corporate Services
Old National Bank

Silver:

CBS Construction
John Kuhmeyer & The Canopy Group
Mark and Judy McClellan
Steve and Lou Pfeiffer

Bronze:

CBL Floors
Darlene Scott
LB Carlson
Lunds & Byerlys
Success Computer Consulting



Russ Douglas Phoenix Golf Classic 2022

Thank You to All Our 2022 Sponsors!

Major Sponsors

Made in the Shade 5K Walk, Run & Roll

Phoenix Level

Audrey Nicholson
David and Lynn Myhr
Jane Hess and Mike Kroll
Old National Bank
UCare

Cardinal Level

Deb Kilgore
Joseph Podolan
Paul Severson

Bluebird Level

Anonymous
Darlene Scott
Jeff and Deborah Schmitt
Jennette Wasmund
John's ProCare
Karen Olson
Mark and Kim Calhoun
Mary Peltier
Mary Thirsten
Patricia Casey
Shelley Peltier

Hummingbird Level

Alan Berner
Diane Larson
Elizabeth Stoneburg and
Phillip Romine
Greg and Elizabeth Severson
Gregory Carr
James and Sandra Mishler
Larry Quist
Liz McCambridge
Lynn Bradshaw
Mark and Sandy Games
Mike Stapf
Neil and Patricia Smith
Norman and Rose Joarnt
Peg Olin
Randy and Paulene Roering
Richard Case
Steve and Gail Severson
Wendy Price



From top left moving clockwise:
Susan and Hung with Viking House staff,
Diane Bruce and Julie Stapf with Eric's
House staff, & Jackie Fritsch and family
from Carver House

Thank You to All Our 2022 Sponsors!



Campaign Hits 4-Year Milestone

When we embarked on our *Close the Gap* journey, we had no idea the impact it would have on our direct care staff. Initially, our goal was to raise \$150,000 to support our workforce, when we launched in the summer of 2019.

Thanks to you all, our generous donors, we quickly exceeded our expectations—by that fall, we had already hit our goal! When we hit the 2-year milestone in the summer of 2021, we decided to make this a 5-year campaign. We were two years into a global pandemic and the workforce shortage was not going away anytime soon—we needed to continue supporting our staff.

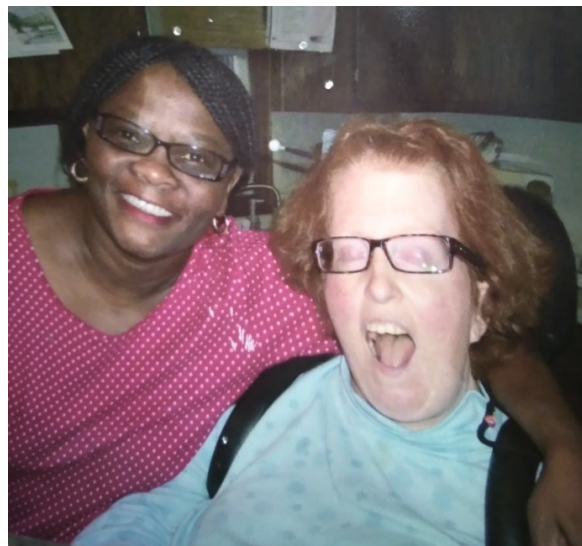
And we've been able to do just that! **Through June of 2023, we have raised \$917,626 for the campaign.** In 2021, we used our *Close the Gap* funds to give our direct care staff pay increases. *Close the Gap* continues to fund that increase. In 2022, we spent \$113,739 on these increases.

Thank you for supporting this campaign!

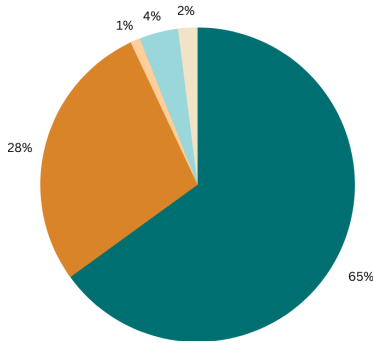


Above: Wendy Hall from Newport House with then DSP Nakia Hammond for her 15-year anniversary with her day program MSS

Right: Deborah Crom from Clinton House with DSP Ola Afolabi

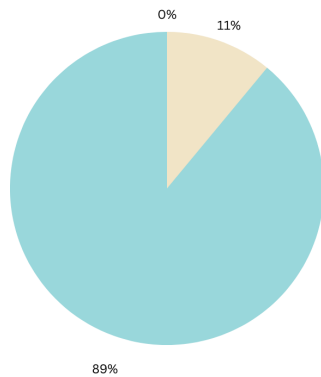


PRI Financials



Total Agency Revenue: \$12,530,304

Intermediate Care Facility	65%
Adult Waiver Facility	28%
Housing Services	1%
Donations & Special Events	4%
Interest & Other	2%



Use of Resources: \$13,345,105

Program Services	89%
Management	11%
Development	0%

STATEMENT OF FINANCIAL POSITION

Assets

	2022	2021
Cash	\$2,068,538	\$2,277,777
Accounts Receivable	\$798,809	\$781,947
Property & Equipment	\$7,027,873	\$6,233,680
Other	\$184,605	\$169,097
Total Assets	\$10,079,825	\$9,462,501

Liabilities and Net Assets

Current Liabilities	\$1,050,615	\$874,168
Long-Term Debt	\$1,255,678	\$0
Total Liabilities	\$2,306,293	\$874,168

Net Assets

Unrestricted	\$7,668,401	\$8,427,195
Temporarily Restricted	\$105,131	\$161,138
Total Liabilities and Net Assets	\$10,079,825	\$9,462,501

PRI Board of Directors

Richard Ivance, M.D.
Chairman

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Director

Garret Colao
Past Chairman

Julie Nagorski
Director

Jennifer Buchanan
Vice Chairwoman

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Director

PSC Board of Directors

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Allison Armstrong
Director

Deborah Gillis
Vice Chairwoman/
Past Chairwoman

Eric Schultz
Director

Darlene Scott
President/CEO

Irene Wright*
Director

Mike Semsch*
Director

**Served part of the 2022
Board of Directors term*

***Thank you to our 2022 Board Members
for all your guidance and support!***

Phoenix Service Corporation

Transitioning to a New Home

At Phoenix Service Corporation, we specialize in helping vulnerable populations find the support and services they need to lead happy and fulfilling lives and sustain independent living. We do this through four programs to offer these vital services. Read on to learn more!

Housing Support Program

The Housing Support Program, formerly known as GRH, is a statewide program that assists individuals who are experiencing homelessness with housing and funds for room and board expenses. We work with individuals in Dakota, Hennepin, Ramsey, and Washington counties.

Through a grant provided by the county, the program pays for rent, utilities, and household supplies to help individuals transition from homelessness to stable housing over a period of 12 months.

In addition to financial assistance, participants meet with their Housing Support Specialist regularly to access essential every day resources, such as mental health and physician services, food shelves, and SNAP benefits.



Housing Support Client Shay



“The goal [for them is] to be off housing support and get housing stability...One of the most rewarding parts is when you house someone experiencing homelessness and see how well they can flourish with housing and someone to support them.”

Community Support Service Coordinator Elizabeth Larson

Case Management

Our dedicated team of 17 case managers work with those we support to make informed decisions about the care they receive and help coordinate their support teams to ensure they are living in the most independent environment possible.

Clients receive waiver funding from the state and utilize their Case Manager's expertise to choose services tailored to meet the needs of their mental and physical disabilities.

“You’re working with a diverse caseload,” said Director of Community Services Megan Avakian, who oversees our Case Management services for 596 clients. **“From childhood to the elderly in completely different settings.”**

Housing Stabilization Services



*Megan Avakian,
Director of
Community Services*

While the Housing Support Program provides immediate assistance to individuals experiencing homelessness, our Housing Stabilization Services (HSS) focuses on long-term housing sustainability. We work with clients in planning for, finding, and moving into a home in the community.

HSS is designed to support clients who are having trouble maintaining housing stability due to factors such as eviction or difficulty working with their landlords. HSS consists of three phases: consultation, transition, and sustaining to find the best fit for them.

HSS is designed to meet people where they are in their moving process and provide person-centered support moving forward. This program is funded through Medical Assistance, as we receive referrals from case managers, outreach programs, and self-referred individuals.

Our primary goal at Phoenix Service Corporation is to help people achieve housing stability and ongoing care. By coordinating services, securing funding, and providing ongoing support, these programs work together to improve the lives of individuals with disabilities every day.

SUCCESS STORY

Jamal Taylor comes from a large family and was born and raised here in Minnesota. Jamal fell on hard times in his past and turned to alcohol and drugs. He lived in several shelters in Hennepin County before deciding to become sober, and eventually began receiving Housing Support services through Phoenix Service Corporation.

Jamal is grateful for what Phoenix has done to help him keep on track and stay sober. He appreciates that Phoenix helps him complete his paperwork, and keeps him up to date with his housing and county benefits. Jamal has worked with the same Housing Specialist, Alan Dale, since he began working with us in 2020.

“Alan is an excellent, calm, and cool guy who is always willing to help me problem solve issues that arise, and he always keeps his appointments,” said Jamal Taylor.

Jamal lives in a duplex with a roommate. Nearby, he has support from the Salvation Army community—attending several groups and has built good relationships with the people and pastor there. In his free time, Jamal enjoys collecting and listening to vinyl records from the ‘70s and ‘80s, especially smooth jazz music.



Housing Support Client Jamal Taylor

Phoenix Service Corporation

Transitional Services

Moving can be a stressful time for many people, and for those in our community, it's no different. To help with the burden, **Phoenix Service Corporation** began offering **transitional services** to make that move just a little bit easier. When the county expressed a need nearly 10 years ago, we jumped at the opportunity. Now, we support individuals moving anywhere within the state.

We provide support to individuals moving into their own home or an integrated community setting, who are receiving waiver services. Referrals are submitted through case managers. We then work with the individuals to coordinate the move and provide essential items needed to live independently.

We work with outside vendors to provide furniture and help with the move. We also shop for and provide household items for the individual, and help pay lease or rental deposits, additional moving expenses (e.g. vehicle rental, packing, unpacking), application fees, and utility set-up fees and deposits. The funding each person receives is limited, so we discuss their priorities and how to allocate the funding, based on their needs. Once the referral is complete, we are reimbursed by the state of Minnesota.

“I’m here to make a stressful time a little bit easier,” said Transitional Coordinator Jessica Lipnik. “I enjoy being able to provide that support and make it an easier process for them. We try to be accessible whenever we can.”

Whether an individual calls worried 10 mins after their delivery window opens because the movers aren't there, or they just want someone to talk to, we're happy to provide a helping hand...There have been times where I've called to confirm delivery time, and I'm on the phone for 20 minutes just talking to them because it's a stressful time,” said Jessica Lipnik.

As we always say, we keep Life Moving Forward.

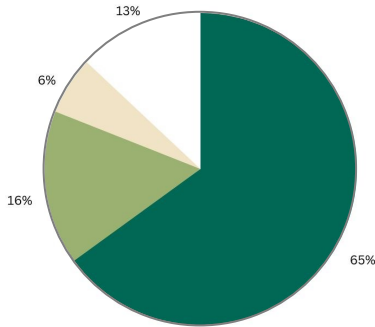
TESTIMONIAL

“You recently went above and beyond in helping my client [with his] transitional services... I checked in with him today and he stated **he cried tears of joy for the first time in his life**, because the items you picked out for his new home were so beautiful and perfect!

Thank you for the important work you do! You made a tremendous impact on him settling into his new home!”

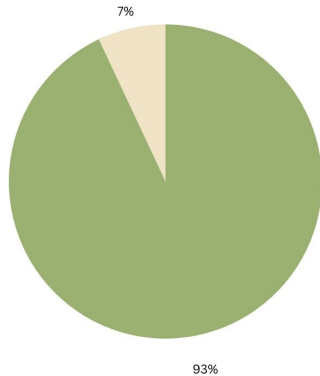
Lauren Pehler, Case Manager

PSC Financials



Total Agency Revenue: \$1,664,669

 Case Management	65%
 Group Residential Housing	16%
 Housing Supports	6%
 Other Supports	13%



Use of Resources: \$1,654,360

 Program Services	93%
 Management	7%

STATEMENT OF FINANCIAL POSITION

Assets

	2022	2021
Cash	\$827,740	\$927,439
Accounts Receivable	\$158,848	\$150,938
Property & Equipment	\$16,358	\$26,185
Other	\$141,334	\$9,602
Total Assets	\$1,144,280	\$1,114,164

Liabilities and Net Assets

Current Liabilities	\$153,976	\$134,169
Long-Term Debt	\$0	\$0
Total Liabilities	\$153,976	\$134,169

Net Assets

Unrestricted	\$990,304	\$979,995
Temporarily Restricted		
Total Liabilities and Net Assets	\$1,144,280	\$1,114,164

2022 Donations

A heartfelt thank you to all our donors!

*Donations received from
January 1 - December 31, 2022.*

\$50,000

Pat Burns

\$10,000 - \$25,000

Kate Dwyer
South Robert Street Business Assoc.
Tom and Mary Deeney

\$2,000 - \$8,500

Darlene Scott
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John's ProCare
Joseph Podolan
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Kurt and Gina Kastel
Linda Steinworth
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Minnesota Coaches, Inc.
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Pat Casey
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Tom Cherry and Darlene Hafner
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\$1,000 - \$1,999

Audrey Nicholson
Barb Magnuson
CBL Floors
CBS Construction
Deb Kilgore and Carl Fritsch
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\$1,000 - \$1,999

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James Tankenoff
Jody Dvorak
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Lucy Tanner
Lunds & Byerlys
Mark and Judy McClellan
Mary Jo Bailey
Mary Thirsten
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Nicholson Family Foundation
Steve and Lou Pfeiffer
Success Computer Consulting
UCare

\$250 - \$800

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Ken Ward
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Mark Jaszewski
Mary Peltier
Michael and Laurie Udenberg
Mike Stapf
Nancy Trautman
Ned Therrien



DSP Barb Knafla and Mike Kelley from Suburban House

\$250 - \$800

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Shelley Peltier
Steve and Gail Severson
Stinson Automotive
Thomas and Eileen Jaszewski
Tim and Patty Egan

\$100 - \$249

Agye Agyeman-Prempeh
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Dan and Deanna Roering
Dan and Jackie Larson
Dave Douglas
Elizabeth Stoneburg and Phillip Romine

2022 Donations

We sincerely apologize if anyone was unintentionally omitted from the donation list. Thank you for your generous donation!

\$100 - \$249

Geoff and Kaylene Roering
Gregory Carr
James and Sandra Mishler
Jeff Points
Jen Weschcke
Jim Hannigan
Jim Woodard
John and Deborah Besch
Josephine Bredesen
Justin and Katie Roering
Karen Steiner
Keenan and Denise Raverty
Kirsten and Eric Gregerson
Larry Quist
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Lynn Bradshaw
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Ruth Gromek
Sherry Gray and David Blaney
Thripurabai Bhanu
Tina Hayes
WCMC
Wendy Price

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Anna and Dale Lamb
Anneliese Adams
Barbara Green
Bell Bank Mortgage
Ben Pierce

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The Canopy Group
Theresa Lippert
Tim Odell
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Tom Strutz
Valmer and Judy Barrows
Vanessa Herbst
Wayne Gorr
William and Mary White
Zach Boughton

*Teresa Turbes from
Furness House with
Assistant Program
Director Hilda Momanyi*

2022 Donations

Memorials

In Memory of Barb Deeney
Tom and Mary Deeney

In Memory of Regina Turbes
Linda Manley-Kuitu

In Memory of Mary Loretta Lippert
Theresa Lippert

In Memory of Lee and Phyllis Larson
Janess L. Davis

In Memory of Sharon Severson
Paul Severson

In Memory of Betty and David Stapf
Mike Stapf

In Memory of Sally Cohen
James Tankenoff

In Memory of David Harves
Darlene Scott
Mary Thirsten

In Memory of Barbara Madera
Mary Vilmur

In Memory of Billy McDonald
Ken Ward

Honorariums

In Honor of Tanita Kurten
Howard and Carol Kurten

In Honor of Michael Hutchinson
Elaine Hutchinson

In Honor of Emily Myhr
Rosemary Leopold

In Honor of Jill Jaszewski
Dona and Gene Maki
Mike and Joan Gasaway
Ruth Gromek

In Honor of the Turbes Sisters
Jody Dvorak

In Honor of Matt Stoneburg
William and Mary Frances Stoneburg

In Honor of John Reson
James Tankenoff



Kathleen Owens from Ludden House

In Honor of Laura Quist-Knox, Her Housemates, and All the Exceptional Staff
Fran and Linda Pierce
Gregory Carr

In Honor of the Caring Phoenix Community of Residents and Staff
Karen Steiner



Left: DSPs from Centerville House, Victoria & Zenitha

Below: Michelle Barrows from Howard House with then Assistant Program Director Britain Olson

In-Kind Donations

Alan Berner
Brenda Goldenstein
Britain Olson
Costco Burnsville
Costco Coon Rapids
Darlene Scott
Deb Kilgore
Debbie Willis
Jackie Larson
Jennette Wasmund

John Bredesen Jr.
Kirsten Gregerson
Mary Thirsten
Megan Avakian
Ned Therrien
Sandra Bredesen Burrowes
Sandra Woulfe and Patrick Muellerleile
Sarah Hansen
Veronica Keys



Thank You!

Thanks to your commitment and generosity, we provided the individuals we support with the person-centered care they deserve. We could not have done this without you, so thank you for supporting us!

**From All of Us Here at
The Phoenix Residence, Inc.
and Phoenix Service Corporation**



Above: Hung from Viking House with Program Manager Veronica Keys

Left: East Region Program Managers Britain Olson, Michelle Tinsley, Shirlena Wilson, and Hilda Momanyi

Contact Us

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Saint Paul, MN 55107
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www.phoenixresidence.org | www.phoenixservicecorp.org

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