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Report to the Community 2017

About Merrick, Inc.

Merrick, Inc., is a nonprofit 501(c)(3) corporation, licensed by the Department of Human Services to provide: Adult Day & Memory Care, Day Training and Habilitation, and Supported Employment.

We offer a variety of meaningful work options and life enrichment activities to over 375 adults with intellectual or developmental disabilities (I/DD) at our energy efficient facility in Vadnais Heights and a second site in North St. Paul.

We are dedicated to empowering adults with disabilities through vocational and social opportunities, and guiding them toward realizing their goals and dreams.

Through person-centered planning, a self-discovery process and self-advocacy activities clients at Merrick are finding their place in the world by:

- working in desired and meaningful jobs,
- being actively engaged in their communities,
- building relationships,
- enhancing personal skills, and
- leading more self-determined lives.

Mission, Values & Vision

MISSION STATEMENT

Our mission is to empower adults with disabilities through vocational and social opportunities, and to guide them toward realizing their goals and dreams.

CORE PURPOSE

To make a meaningful difference one person at a time.

CORE BELIEFS

Self-Determination - responsible for one's choices and actions,

Economic Fairness - balanced action between parties,

Civic Responsibility - action that contributes to the common good.

DIVERSITY STATEMENT

As a company, we are aware of and value differences.

VISION STATEMENT

Our vision is to be the agency of choice for every client and business partner we serve, leading the way in supporting each client in their quest to live the life they choose.



A Message from the Executive Director

Dear Friends,

Recent results of newly required Career Counseling, Information, and Referral sessions conducted by Minnesota's Centers for Independent Living revealed five out of six clients receiving on-site and work crew options from Merrick, Inc., want these services to continue. We take pride in offering a continuum of service options for adults with intellectual or developmental disabilities to live out their goals and dreams. We offer BOTH life enrichment and work support options; and over our 50+ year history, clients have grown their interests, transitioning between various work options, and our life enrichment programs.

In recent years, massive reform initiatives have been undertaken at the federal and state level, pertaining to day programs. Changes to the Disability Waiver Rate Management System have drastically altered the level of government reimbursements, leaving us with a forecasted loss in funding of more than \$300,000, effective on 1/1/20. Alongside this reform, is a package of new waivers that will effectively push individuals into pursuing minimum wage work in the general workforce, despite this not being a primary goal for five out of six people we serve.

Along with working to correct the Rate Management System, we have taken steps at Merrick to minimize the impact a loss of funding will bring. We have established a New Revenue Committee to investigate business investment opportunities; we are planning to implement a number of recommendations from a recent organizational analysis to align practices with funding; and we have focused our charitable gambling division on operations that bring in the best rate of return.

Every day at Merrick, we witness wonderful moments that affirm we are improving the lives of the clients we serve. These moments inspire us to continue to do our best to change the system when we can and operate within it when we must. Our work continues in developing and maintaining the capacity for future mission relevance, providing better support to self-advocate groups, valuing direct support professionals, ensuring sufficient cash reserves, improving our communications with supporters by updating the website and social media channels, and preserving informed client choice.

Our work in guiding adults with disabilities is made possible with the generosity of donors, business partners, volunteers, clients' families, and local foundations. We are grateful for your continued support as we strive to meet client needs in whatever setting they choose, whether it be in life enrichment, or by participating in any of our work options (center-based, work crew, or direct hire).

Sincerely,

John Wayne Barker, Executive Director



Our Programs

Life Enrichment Activities

Merrick provides an atmosphere for clients to articulate their needs and desires, to build relationships, participate in social opportunities, develop leadership skills, and reach personal goals. Clients participate in activities and therapies to develop social relationships, improve self-esteem, and maintain health for a better quality of life.

Program Highlights

Client and stakeholder results for 2017 showed a 99.8 satisfaction rating.

Our staff supported work goals of 283 clients who found meaningful employment through Merrick. Clients were employed at major corporations, gas stations, dental offices, grocery stores, retail stores, restaurants, partnering non-profit organizations, and on our own work floor.

Eighty-four clients worked on their life enrichment goals and experienced an increase in choices. Activities requested by the clients included musical theatre, bowling, garage sale shopping, visits to the library, yoga, art, horticulture, and music.

Work Opportunities

Client employment is a primary focus of our program and includes center-based contracts completed at our building in Vadnais Heights, or employer-based options for placement of individuals and work crews at the business location. Clients experience work that improves self-esteem, develops social relationships, and generates discretionary income.



Remembering Colleen Timbers

In Memoriam

In August 2017, Colleen Timbers, Merrick's Program Training and Resource Director passed away. If a company has human qualities, Colleen was the soul of Merrick, Inc., and her contributions to our programs are immeasurable. In her 33 years at Merrick she was a teacher, change agent, regulatory expert, and self-advocacy champion. Colleen dedicated her life to the clients at Merrick, and to adults with disabilities in general. She guided Merrick's peer mentors, led the creation and development of the Ambassadors for Respect Program, and oversaw the support of Merrick's five weekly self-advocacy groups. Her vision for our Adult Day Services and Memory Care Program became a reality with her personal search for a town with a "Mayberry-like" feel where clients would be part of the fabric of the community. She is greatly missed.



Program Highlights

Business Highlights

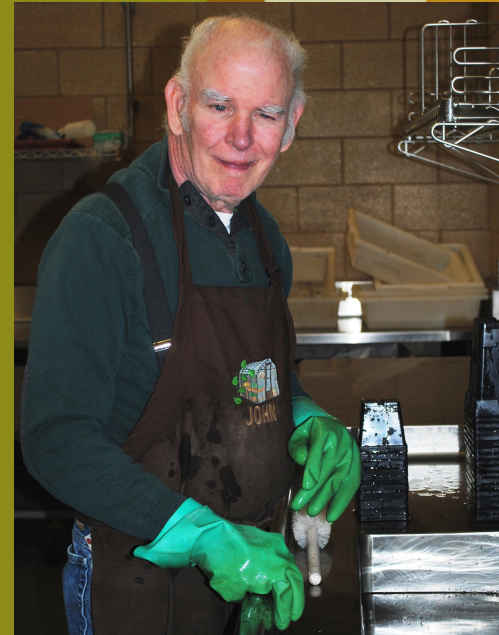
Our recycling program processed nearly one million pounds of plastic bags, film, and plastic bottle caps, providing jobs for 27 clients and their seven direct support staff. Since the program's inception, we have sent 11 million pounds of plastic to Trex, our business partner, for conversion to permanent decking material.

The document destruction team processed nearly 300,000 pounds of documents and pull tabs.

We partnered with twenty new businesses across all production areas, providing meaningful work for clients.

We received a "clean" (unmodified) audit for fiscal year '17, with no material weaknesses.

Our Charitable Gambling Division contributed \$270,654.00 to support programs and operations.



Self-Advocacy Highlights

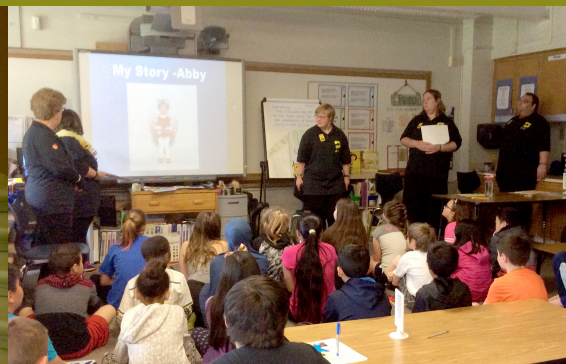
Self-advocates (clients) at Merrick conducted a food and toy drive and presented the donations to the Vadnais Heights Lions Club.

On average, 100 self-advocates participate in one of four weekly self-advocacy groups at Merrick.

Sixteen self-advocates have graduated from the Partners in Policymaking program, an intensive eight-month leadership training program.

Staff accompanied clients on a trip to the Minnesota State Capitol to meet with legislators and participate in a rally to build awareness for issues that are important to people with disabilities.

The Ambassadors for Respect, funded by the MN Governor's Council on Developmental Disabilities, and created at Merrick, conducted interactive anti-bullying presentations for 2,403 students, and 138 teachers in 4th grade classrooms since its inception in 2013.



Volunteer Spotlight

Each year, the “Elves”-- a group of clients’ moms and friends, work with Merrick staff to host the Client Holiday Party. What started more than 30 years ago as a special way to celebrate Christmas has grown into the highlight of the year for many clients at Merrick. Clients look forward to the party all year long and don their holiday best to celebrate the occasion.

Under the leadership and assistance of Merrick staff members, the Elves bring a can-do attitude to the table. They have supported the event by cutting cake, gathering supplies, and anything else that was needed to

make things go smoothly. Back in the early days of the party, staff and The Elves rounded up free and discounted pizzas from local pizza shops. The Elves raise funds to pay for the party by hosting a “Bakeless Bakesale” which grew with the realization that it wasn’t necessary to sell homemade brownies or cookies, but instead the volunteers ask their family and friends for donations to cover the cost of the party. Over the years, the party has been perfected with an annual appearance by Santa and Mrs. Claus, a DJ that begins pumping out dance tunes at 8:00 am, a complimentary keepsake photo by a local artist, and an elegant setting that delights all the guests.

The core group of Elves has remained the same over the years, although some of the original Elves have passed away; we recently lost Peg Monn and Pat England. Their contributions to this meaningful event will be missed!



Business Partner Spotlight



H.B. Fuller, has been a leading global adhesives provider focusing on perfecting adhesives, sealants, and other specialty chemical products that lead to innovation in electronics, hygiene and medical products, transportation, clean energy, packaging, construction, and woodworking. H.B. Fuller is a global company, building connections within local communities. Our neighbor to the north on Labore Road, has been an ideal business partner and supporter.

In 2014, H.B. Fuller executive, Len de Llano joined the Merrick Board of Trustees and immediately began looking for ways for the two organizations to collaborate. Soon clients were assembling adhesive boxes, a necessary task that had previously been done by H.B. Fuller staff who could instead focus on other responsibilities. (Today, our teams of clients assemble more than 8,500 boxes per week on average!) H.B. Fuller’s support of Merrick grew with event sponsorships and grant funding. In 2015, Merrick was chosen as H.B. Fuller’s charity of choice for the company’s Make A Difference Day, when 20 employees spent a day at Merrick helping with landscape projects, cleaning up our bocce court, and serving ice cream sundaes to clients. When Len de Llano retired from the company in 2016, he also retired from the Merrick Board of Trustees, appointing Becky Gilles, H.B. Fuller’s Global H.R. Director, to take his place on the board and continue H.B. Fuller’s commitment to Merrick. We are thankful for our neighbor’s support!

Client Spotlight

At Merrick Inc., we empower clients to lead the lives they desire by connecting them with the tools and opportunities they need to succeed. We do so by building up each individual's skill set and by determining their unique interests and preferences. One of the 375 clients is Missy who has chosen us to provide her employment support for more than 24 years.

Missy graduated from Lexington High School in 1990. After high school, she attended North East Metro 916 from 1990-1992 where she became certified in food preparation. Missy has worked in the restaurant industry since 1991 and has been an employee at Panda Express for over a year.

Missy enjoys spending time with friends and her boyfriend, Scott. She also loves eating at Red Lobster, going to movies and getting together with friends. Missy lights up any room with her presence and has a natural glow that emanates from her smile. She accepts challenges with a "can do" attitude. As a worker, she is always willing to lend a hand, is an attentive listener and does her best to make those around her feel valued.

Missy's dream job is to be exactly where she is today - Panda Express! She states that the people she works with are kind, hard workers who treat her respectfully. Aspects of her job that Missy enjoys are greeting the customers and making sure they have a memorable dining experience.

Missy describes herself as an easy-going, good friend who always has a smile. She is proud of her personal and professional accomplishments and enjoys talking about her job at Panda Express.

The restaurant's general manager describes Missy as a genuine, bubbly, hard worker who is always willing to be challenged. She follows Panda Express's mission, accomplishes what is asked of her and is superb with customers. She is the only employee who has received complimentary recognition on several occasions from guests both online and via phone calls to the restaurant. Congratulations Missy on landing your "dream job," and thank you Panda Express for supporting her as a valued member of your team!

Missy's Life Motto: "Smile even if you are having a bad day."



2017 Goals & Outcomes

Company Goal 1

Ensure financial strength and diversify revenue sources.

Outcomes

A new revenue committee was established with the goal of reviewing business proposals for generating non-governmental revenue.

For each of the three fundraising events, sponsorships were procured to cover the cost of all expenses.

Grants from three new funders were secured to provide arts programming and funding for the reconfiguration of the recycling spaces.

Company Goal 2

Increase employee satisfaction.

Outcomes

An action plan was created to increase employee satisfaction.

A set of Merrick core competencies was developed for leadership positions.

Individualized client progression plans were created that include appropriate people and follow the client from enrollment to the achievement of goals.

A consultant was engaged to conduct an organizational analysis and make recommendations for improving practices and provide training for all staff.

Company Goal 3:

Prepare for new service options that encourage direct hiring of clients served by Merrick.

Outcomes

A grant to create the Job Services program was secured, offering job exploration, skill development, and employment support services.

Forty-two clients have taken part in Job Services, depending on their specific needs.

2018 Company Goals

Company Goal 1: Ensure financial strength and diversify revenue sources.

Company Goal 2: Maximize community outreach and visibility.

Company Goal 3: Increase employee satisfaction.

Merrick Leadership

Board of Trustees

Jamey Austad
Tanmay Barman-Roy
Andy Engen
Crystal Saric Fashant
Frank Gilbertson
Becky Gilles
Sherrie Kenny
Erik Levy - Treasurer
John Marzitelli – President
Heather Monnens - Secretary
Joe Murphy – Vice President
Jeff Norsted
Jackie O’Connell – President
Diogo Reis – Vice President
Dan Schneeman

Director Team

John Wayne Barker – Executive Director
Jim Chicone – Technical Assistance and Training Director
Pat Hanson – Operations Director
Dede Hauck – Program Director
Karen Herrera – Development and Communications Director
Robin Mallek – Program Director
Jane Peltier – Human Resources Director
Colleen Timbers – Program Director

Support Merrick

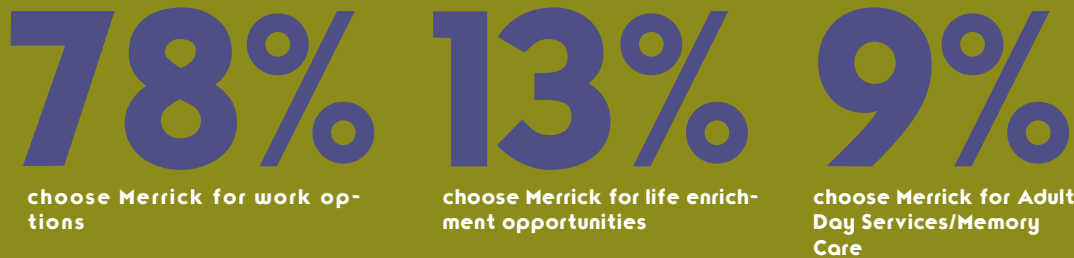
Help Merrick continue to grow!

Refer client work opportunities to us.
Hire us for your paper shredding/document destruction.
Join us on Facebook, Twitter, and LinkedIn.
Tell your friends about us.
Host an event to raise funds and awareness of Merrick.
Volunteer your time on a committee or the Board of Trustees.
Donate – cash, stock, and in-kind gifts are all gladly accepted.
Remember Merrick in your estate plans.
Ask your employer to match your contribution.



Merrick by the Numbers

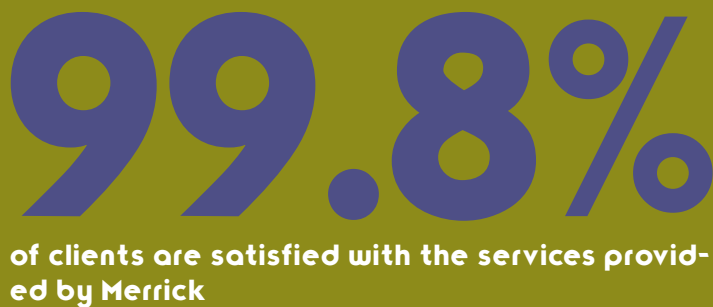
Why Clients Choose Merrick



Business Contracts



Client Satisfaction



Financials

Balance Sheet

	2017	2016
Assets		
Fixed Assets	\$4,899,550	\$5,076,421
Current Assets	\$2,947,160	\$2,712,564
Total Assets	\$7,846,540	\$7,778,925
Liabilities		
Total Liabilities	\$3,612,288	\$3,842,880
Net Assets		
Unrestricted	\$4,177,164	\$3,854,394
Temporarily Restricted	\$57,088	\$81,651
Total Net Assets	\$4,234,252	\$3,936,045
Total Liabilities and Net Assets	\$7,846,540	\$7,778,925

Income and Expense Statement

Revenue	\$9,580,698	\$9,534,468
Expenses	\$7,985,526	\$7,792,297
Program	\$1,110,694	\$1,167,947
Administration	\$186,271	\$171,439
Total Expenses	\$9,282,491	\$9,131,683



Thank you for your Support!



Photographs Contributed by Cadex Herrera, Steve Kjelland* Photographers and Susan Sparling Micks.



3210 Labore Road
Vadnais Heights, MN 55110

Save the Date!

4th Annual Big Wood Brewery Golf Tournament, benefiting Merrick, Inc.

Monday, July 16, 2018 @ 12:00 p.m.

Oak Glen Golf Course

Social Media Graphics: www.bigwoodbrewery.com <<http://www.bigwoodbrewery.com>>
www.merrickinc.org

Empower!

A new lunch event to share Merrick's story and raise funds for our programs. This event will replace the annual gala.

Thursday, October 4, 2018 @ 11:30 a.m.

Vadnais Commons

