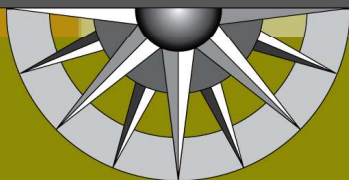




**Merrick, Inc.**  
EMPOWERING ADULTS WITH DISABILITIES



# **Report to the Community**

## **2019 - 2020**

# About Merrick, Inc.

Merrick, Inc., has been providing day services to adults with intellectual or developmental disabilities (I/DD) in Ramsey County since 1964. We offer a mix of life enrichment, prevocational, and day services to more than 375 clients. Merrick is the largest day program in Ramsey County with a 56-year history of leadership in person-centered planning, self-advocacy, meaningful work options, operational excellence, and continuous innovation.

We strive to support clients in finding the best fit for them, whether it is through life enrichment opportunities or meaningful work. With person-centered planning 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 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 BELIEFS

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

Economic Fairness – balanced action between parties

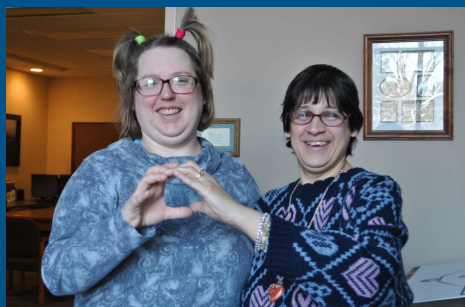
Civic Responsibility – action that contributes to the common good

## 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:

In January of this year, I summed up the first half of Merrick's fiscal year as "one of the best in my 20+ years at Merrick." My observation was based on several factors, including client satisfaction, staffing, and the company's financial performance.

When other providers were eliminating their onsite employment options, clients at Merrick enjoyed opportunities to gain skills and find the best job fit, whether that was onsite, with a work crew at a local business, or directly employed by a business partner. With a waiting list of more than 40 people interested in our programs, Merrick once again led the county in average hours worked and wages earned by clients in our employment programs. Our life enrichment programs were also flourishing, with managers empowered to introduce new activities. Additionally, our self-advocacy programs were refocusing their purpose and experiencing renewed energy.

In 2019, we raised the starting hourly wage for Direct Support Professionals (DSPs) to \$15.00 even though our reimbursement rates were based on \$13.33. We took this bold step knowing that adults with disabilities deserve the best supports possible and that DSPs are worth this and more. We believed that by paying higher than the market wage, we could hire and retain the best DSPs. It worked, as we hired some outstanding DSPs and had the lowest number of job vacancies that I can recall.

Our financial outlook was positive, with revenue above budget, and expenses below. Two of our three major fundraising events were still in the offing, and we had Matt Birk lined up as our keynote speaker for our fall fundraising lunch.

On March 18, the MN Department of Human Services (DHS) suspended our services, due to COVID-19. Most clients would not be eligible for unemployment benefits, so we launched a client wages relief fund and raised just over \$50,000. Clients received this money over six weeks in the spring. Finally, on June 8, a limited number of clients were allowed to return to our programs, and this number has gradually increased since then. Our support teams have stepped up in providing a rich remote services life enrichment program for those who are not ready or able to return.

Currently, we have limits on hours and capacity for onsite services; program revenue in the first half of the new fiscal year remains below 50% pre-COVID. I remain optimistic though as we received a forgivable loan and several grants that have helped cover some of our fixed costs.

Throughout all of the changes that we have encountered, what remains a constant positive is the support of our business partners, client families, community members, and our employees. For this, I am genuinely grateful.

John Wayne Barker,  
Executive Director



# Our Programs

We provide an atmosphere for clients to articulate their needs and desires, to build relationships, participate in social opportunities, develop leadership skills, and reach personal goals. Additionally, clients participate in activities and therapies to improve self-esteem and maintain health for a better quality of life. Clients find the support they need across the various stages of their lives. Some people gain work skills onsite at Merrick and then seek employment on a work crew. Others work independently and only need regular check-ins by our Employment Specialists. For those who do not have employment as a primary goal, our life enrichment programs provide a variety of enriching activities.

## Life Enrichment

Clients who choose Merrick for life enrichment services have access to community inclusion activities; therapeutic experiences including animal assistance, yoga, horticulture, and music sessions; arts and crafts; sensory integration; social and recreation activities; positive behavior supports; augmented communication including assistive technology and American Sign Language; and enriched staff-to-client ratios. Clients enjoy having a choice of activity settings and individualized strategies and schedules to promote emotional, mental, and physical health.

Our response to the COVID-19 pandemic also brought the opportunity for clients to engage with the programs remotely. Our staff led virtual field trips, science experiments, trivia matches, and coffee visits all online.

## Employment Support

We offer support in the next BIG step for individuals with intellectual or developmental disabilities to explore, develop, and maintain desired employment. This person-centered approach focuses on each individual's skill set and preferences. Equally as important as securing the right job is maintaining the right job. To support this success, we provide soft skills training, on the job training, and ongoing follow up support for the duration of the individual's employment at a business partner's location.

For clients whose goals are to work in the general workforce, we provide Employment Exploration, Development, and Support services. The needs of each person are evaluated individually to provide the right supports.





# Self-Advocacy Highlights

Clients enrolled in our life enrichment and employment support programs can participate in weekly self-advocacy groups. Each group elects officers yearly and determines the group's priorities, goals, and outcomes. Self-advocacy meetings and activities were provided remotely during the COVID-19 pandemic.

Self-advocacy highlights this year:

- Self-advocates at Merrick conducted a food and toy drive and presented the donations to the Vadnais Heights Lions Club.
- On average, 75 self-advocates participated in one of four weekly self-advocacy groups at Merrick (pre-pandemic).
- Pre-pandemic, twenty self-advocates joined three Direct Support Professionals and Executive Director John Wayne Barker for Disability Services Day at the Minnesota State Capitol to meet with legislators and participate in a rally to encourage awareness of issues affecting people with disabilities and their caregivers.
- The Ambassadors for Respect, funded by the MN Governor's Council on Developmental Disabilities, and created at Merrick, conducted interactive anti-bullying presentations. The Merrick team led one live workshop before switching to a remote format to finish out the distance-learning school year.



# Business Highlights

- Our recycling program processed nearly one million pounds of plastic bags and film, providing jobs for 28 clients. Since the program's inception, we have diverted more than 13 million pounds of plastic waste from Minnesota's landfills, and the plastic is used to manufacture composite decking material.
- The document destruction team of eight clients processed and recycled nearly 300,000 pounds of documents and pull tabs.
- We received a "clean" (unmodified) audit for fiscal year '20 with no material weaknesses or significant deficiencies.
- Our Charitable Gambling Division contributed more than \$408,000 to support programs and operations, despite a three-month COVID-19 related closure of operations.

# Volunteer Spotlight

In 2017, retiree Pat Price found an amazing way to volunteer and connect with clients at our North St. Paul program. Every Tuesday (pre-pandemic), she brought her sewing expertise to the clients. She started them with straight-line projects that included aprons, potholders, and pillowcases but has since progressed to quilts. She has really gotten to know the clients and learned how best to work within each person's ability. Some work the foot pedal positioned on the table with their hands as Pat leads the needle through the fabric while others create more independently under supervision.

When Pat first began volunteering, none of the program staff knew how to sew, but they learned by observing and assisting her.

Pat's association with the program has led to increased client interest in learning how to sew as well as increased visibility for the program in the community. Most importantly, it has enriched the lives of all involved: clients, program staff members, and of course, Pat herself! The COVID-19 pandemic has put a pause on her weekly visits, but there is hope she can return to the program in the spring.



# Business Partner Spotlight

Based out of White Bear Lake, MN, Ferlic Filter is a medical supply company that provides top tier x-ray cassette covers and filters to hospitals and diagnostic centers across the country. In business for more than 25 years, they take great pride in their collaboration with Merrick, Inc., which began in 2015 with clients counting and packaging the covers.

Since the early days of the partnership, the current owner, Carly Nelson has regularly visited with the clients who work on the Ferlic Filter contract. Along with Merrick employees she has built a positive work environment by hosting monthly pizza parties, drawings for gifts cards, and an annual holiday party.

Over time, Merrick employees and clients began to manage more and more of the logistics, and today they handle the entire supply chain of x-ray cassette covers. The onset of the COVID-19 pandemic brought an even greater need for this medical product. We look forward to the continued partnership with this essential business.





# Client Spotlight

It was 2003 when Katie first chose to seek guidance from Merrick, Inc.'s employment support services after leaving a cleaning job. Since then, Katie has taken full advantage of Merrick's many opportunities while continuing to chase her dreams.

Initially, Katie joined Merrick's work floor crew, where she packed greeting cards. After several years of onsite work, Katie decided a change was in order and made it her goal to find a new job. With the support and guidance of Merrick's staff, Katie chose to join one of Merrick's recycling crews. The change was worth it as Katie found new happiness in her work, not to mention a raise in pay.

Katie is a regular at some of Merrick's annual events. She has been a bowler at Merrick's Annual Bowl-A-Thon for many years, where she has placed as high as second in the Top Performer Tournament and even has the medal to prove it. She also enjoys helping out at the annual golf scramble and visiting with golfers.

Katie's determination to live her best life pushes her to continually set new goals for herself and to enjoy life wherever it leads. In her free time, Katie loves shopping, cheering on the Minnesota Twins and the Wild, and watching her favorite movies. Pre-pandemic, Katie started going to the gym after deciding she wanted to lead a healthier life. However, the most important part of her life remains the people: her friends and her family.

Like many of us, Katie's job became unavailable during the pandemic. Wanting to continue to work, Katie has returned to onsite work at Merrick, where she has steady and reliable work. She plans to return to her recycling job once the pandemic has subsided, and her crew has reassembled. Katie knows Merrick is with her every step of the way as she works toward her goals.





# Community Inclusion

Pre-pandemic, clients enrolled in our life enrichment and work support programs enjoyed a variety of activities in the local community when their schedules permitted. Favorite outings were volunteering, boating, visits to apple orchards, farms, specialty shops, museums, and visits with the North St. Paul High School Band. We hope to get back to these meaningful activities in 2021.





# Merrick Leadership

## Board of Trustees

Erik Levy, President  
Crystal Saric-Fashant, Vice President  
Philip Sanfilippo, Treasurer  
Heather Monnens, Secretary  
Diogo Reis, Past President  
Jamey Austad  
Deb Degreeff  
Karen DeYoung  
Becky Gilles  
Kristin Mahre  
Maureen McGarry  
Joe Murphy  
Jackie O'Connell  
Dan Schneeman

## Leadership Team

John Wayne Barker, Executive Director  
Donna Bauer, Human Resources Director  
Jim Chicone, Staff Psychologist  
Pat Hanson, Operations Director  
Dede Hauck, Quality Coordinator  
Karen Herrera, Development and Communications Director  
Robin Mallek, Program Director  
Tammy Miller, Facility and Transportation Manager  
Judy Vollbrecht, Financial Manager

# Support Merrick

## There is a Way for Everyone to Get Involved

- **Refer** client work opportunities to us.
- **Hire** us for your paper shredding/document destruction.
- **Join** us on Facebook, Instagram, and LinkedIn. Tell your friends about us.
- **Tell** your state legislators that the work Merrick does is crucial to our vibrant communities.
- **Volunteer** your time on a committee or the Board of Trustees.
- **Donate** – cash, stock, and in-kind gifts are all gladly accepted. Will your employer match your contribution?
- **Become** a Champion Club member with a monthly gift to Merrick at [www.merrickinc.org/champions](http://www.merrickinc.org/champions)

## Merrick's Champions Club

Monthly giving is one of the easiest and most convenient ways to help us carry out our mission to empower adults with disabilities. The average cost per client to provide services is \$80/day and the governmental reimbursement is \$75/day creating a \$5 daily gap per client. Champions Club members play a crucial role in closing this gap. Over a year's time, a monthly gift of just \$10 will cover this gap for a whole year for a client.



"I've been a long-time supporter of Merrick Inc., and I have had the privilege of serving on the Board of Trustees for the past few years. With life as busy as it is, I often found myself forgetting to make a monthly contribution until the option to become a "monthly giver" became available. It was easy to set up the automatic payments, and I'll never again forget to contribute to the organization I am so proud to support."

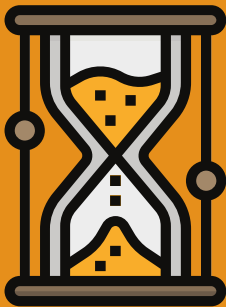
Crystal Saric-Fashant

# Merrick By the Numbers



**77% Work Support**  
**13% Life Enrichment**  
**10% Adult Day Services**

Client Program  
Enrollment



**12.4 Years**

Average  
Client Tenure



**97.7%**

Client Overall  
Satisfaction



**102,208**

Hours of Direct  
Support Provided



**58**

Business Partners  
Providing Work



**8.5 Years**

Average  
Employee Tenure



# Financials

## Balance Sheet as of June 30, 2020

<b>Assets</b>	<b>2020</b>	<b>2019</b>
Fixed Assets	\$4,255,252	\$4,479,506
Current assets	\$3,315,886	\$3,180,622
Total Assets	\$7,571,138	\$7,660,128
<b>Liabilities</b>		
Total Liabilities	\$3,085,979	\$3,162,997
<b>Net Assets</b>		
Unrestricted	\$4,448,670	\$4,476,132
Temporarily Restricted	\$36,489	\$20,999
Total New Assets	\$4,485,159	\$4,497,131
Total Liabilities and Net Assets	\$7,571,138	\$7,660,128

## Income and Expense Statement

<b>Revenue</b>	\$9,288,795	\$9,999,731
<b>Expenses</b>		
Program	\$7,692,081	\$8,003,678
Administrative	\$1,411,594	\$1,395,352
Development	\$197,692	\$207,335
Total Expenses	\$9,300,767	\$9,606,365



**Thank you  
for your  
support!**



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Vadnais Heights Program**  
**[www.merrickinc.org/tour](http://www.merrickinc.org/tour)**

