



Beverly Farm Foundation, Inc. (and affiliates)

Annual Report 2015



About Us

Beverly Farm Foundation, Inc. (Foundation) is an 80 acre community where 360 individuals with intellectual/developmental disabilities choose to live and enjoy their neighborhood. The community's corporate office is located at 6301 Humbert Road, Godfrey, Illinois, the original site of the operations of Beverly Farm since 1897. There are three affiliate corporations. Beverly Farm Association, Inc. and Beverly Farm Endowment, Inc. are supporting organizations for the main Foundation operation. Beverlyfarm Living Options, Inc. is the home and community based services affiliate for the Beverly Farm corporations.



Beverly Farm Foundation Mission

Provides a loving, caring home for adults with intellectual/developmental disabilities, providing each individual with physical and emotional security and a dignified quality of life, with opportunities and challenges, within their functional capabilities.

Beverlyfarm Living Options Mission

Promoting opportunities, choice and independence through supports and services to people with intellectual/developmental disabilities.

Beverly Farm Developmental Training Center Mission

A philosophy that everyone with proper training can grow and develop to achieve greater independence.



Operations

Residential and Training Services



Beverly Farm Foundation offers three types of living arrangements; 10 apartments, 6 group homes and 10 dormitory cottages. Beverlyfarm Living Options, offers a fourth style. This community integrated living arrangement (CILA) is located within a few miles of the corporate office.

Individuals are provided with the levels of supports and services needed to gain independence, enjoy recreational opportunities and participate in determining their future. Each individual is provided with a complete array of assessments and evaluations to assist a support team of professionals, family and friends and the person to develop a plan that will establish priority supports desired and needed by the person. The support supervision required ranges from twenty-four hour to an intermittent supervision level.

Located on the Beverly Farm Foundation main operations property is a state of the art recreational center that provides opportunities for exercise, swimming, crafts, art classes, quilting, theater, horticulture, sports and dancing. In addition, there are numerous opportunities for shopping, dining out, movies, opera, concerts, professional ballgames and attendance at local and regional events. There are opportunities for individuals to attend the nearby community college either part or fulltime.

Also located on the main operations property is the medical clinic. The medical clinic is equipped with waiting room and two exam rooms. There are 27 nurses, two medical technicians, and a medical secretary responsible for the operations of the clinic. The clinic is headed by Diana Corzine, Director of Nursing. Three physicians provide primary care services for those living in the Beverly Farm communities: Dr. Pryia Kumaraguru who joined the medical team in 2013; Dr. Brian Steele, who joined us four years ago; and Dr. Vinya Kamat. Dr. Kamat has provided physician services for us for nine years, the first two here in our clinic and the past seven in his office. These physicians have the experience and knowledge of disabilities that is critical to provide the necessary and specialized care needed. There are several specialty physicians who also provide care one day per month covering neurology, podiatry, gynecology and psychiatry. A full array of physicians is available in the surrounding communities to provide choice in medical services.

The Developmental Training Center (DT) is located approximately one and one half miles from the Foundation's main operations. DT promotes independence, strives to assist each individual with the skills desirable for employment while also working to maintain daily living skills. The Training Center also includes programs for individuals who prefer more of a retirement type of activity during the day, janitorial and bakery work opportunities. DT offers services to an average of 349 individuals during the year. Most individuals attending the DT Center complete some amount of paid work



during the year. The largest amount of work comes from a contract for product assembly with Gemini Industries. Pieces assembled numbered 27,247,390 for one year ending June, 2015. Other work opportunities involve a contract with Mid-America Transplant Services for the assembly of replacement bones for organ donors.

Residential and Developmental Training operations are licensed and inspected by various state agencies in Illinois. Illinois Department of Public Health completes annual inspections of the residential services and the Department of Human Services completes an annual inspection of the CILA home and the DT Center program.

These programs make up the majority of the needed employees. The budget is built around a full complement of employees numbering 525. The direct support staff are represented by the American Federation of State, County and Municipal Employees union. Negotiations have been on going in FY 14-15 for a new collective bargaining agreement.

Related Programs

Located on the property is the **Beverly Farm Equestrian Program** which offers a variety of services to community participants and to individuals who reside in the Beverly Farm community. These services are offered on a fee per service basis. The Red Barn, as it is sometimes referred to, has horse boarding and riding lessons. Therapeutic riding lessons are offered for people with disabilities by our PATH certified instructor. Hippo Therapy (Speech) is provided by a licensed speech therapist. Equestrian Camp is offered three weeks over the summer season for varying age groups of young people. The Equestrian Program supports and trains the Beverly Farm Special Olympic Equestrian Team. The Red Barn was expanded in 2014 from 14,000 sf to 20,800 sf. This expansion allows greater service capacity.

The **Shoppes of Beverly Farm** include a coffee shop where people enjoy a variety of specialty coffees and desserts. Desserts are baked by individuals at the DT Center who have chosen to work in our bakery. Bakery products are sold to the general community through the coffee shop. Also located within the complex are our gift and resale shops that provide a complete shopping experience. This operation is designed to support the mission of Beverly Farm Foundation.





Financial

Financial reporting is based on the combined financial statements for the four Beverly Farm entities. Beverly Farm Foundation Inc. (Foundation), Beverly Farm Association, Inc. (Association), Beverly Farm Endowment, Inc. (Endowment), and Beverlyfarm Living Options, Inc. (Living Options). Combined total revenue for fiscal year ending June 30, 2015 was \$24,860,851. The Foundation budgeted revenue was built on a census of 387 individuals living at the Beverly Farm community and 353 individuals enrolled in the Developmental Training program. The average census for FY 14-15 in the residential programs was 359 and 354 in the Developmental Training program. During FY 14-15 there were 25 admissions and 23 discharges/deaths. Finances are also impacted by changes in contribution levels. While program revenue was down there was a significant increase in contributions for FY 14-15. Contributions increased from \$1.7 million in the previous year to \$2.7 million. The Organizations did experience an overall drop in investment income from \$1.4 million last fiscal year to \$238,115 this year. The Developmental Training program contracts brought in a total of \$237,665 in revenue. The Foundation and Living Options operating expenses decrease by 3% FY 2014-15. For FY 14-15 there was a \$145,117 increase in net assets.



Fundraising and Board Information

Fundraising is critical to the continuation of the unique variety of services provided at Beverly Farm Foundation. Major events include the Diamonds and Denim Dinner Dance, Godfrey Golf tournament and the Spring Fun Days. Ongoing giving programs are promoted with our annual giving plan. This includes a major spring and year end appeal. Fundraising expense for FY 14-15 totaled \$244,322.



Board of Directors and Family Weekends

There are twelve Board Directors who meet in person two weekends per year for committee meetings, Board meetings and Foundation meetings. The meetings are planned around a Family Weekend for all families of the individuals who live in the Beverly Farm communities. These weekend meetings occur in April and September. On the Friday of Family Weekend there are the various Committee meetings. Families are encouraged to participate in the committee they prefer, multiple committees or just attend and observe if that is their preference. The Board meeting is held on the Saturday morning of Family Weekend. During Saturday morning the Board usually breaks to attend a Friends and Family Support meeting that is scheduled on Saturday morning. On Saturday evening in the Spring, there may be a meet and greet reception and in the Fall, the staff and residents perform in a Variety Show. The Variety Show brings in a full house with musical and acting performances that bring the house down with applause. A third Board Meeting was held in February 2015 via teleconference. Updates are provided to the Board via email on a regular basis.

The **Board of Directors**, city of residence and relationship to Beverly Farm follows:

Chairperson

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| Patricia Downey | Park Ridge, IL | Sibling of resident |
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Vice Chair

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| Jeff Rosignol | Highland, IN | Parent of resident |
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Treasurer

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| Roger Queen | Godfrey, IL | Sibling of resident |
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Directors

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| Barry Allswang | Huntington Beach, CA | Sibling of resident |
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| Brian Birnbaum | Glen Ellyn, IL | Parent of resident |
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| Hartley Carlton | Paducah, KY | Parent of resident |
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| Don Perozzi | Avon, CO | Sibling of resident |
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| Steve Schmidt | Los Altos Hills, CA | Sibling of resident |
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| Glen Tiller | Moro, IL | Parent of resident |
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| George Walker | Severna Park, MD | Sibling of resident |
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| Pam Whisler | Godfrey, IL | Community Member |
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| Keith Wright | Springfield, IL | Parent of resident |
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| William McMahan | St. Louis, MO | Sibling of resident |
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Board Committees

Resident Services

Finance and Audit

Endowment Board

Building and Grounds

Nominating

Strategic Planning (Ad Hoc)

Beverlyfarm Living Options, Inc. (Board)

The following pages contain the **Combined Audited Financial Statements:**