



PHOENIX FAMILY
ANNUAL REPORT



2022

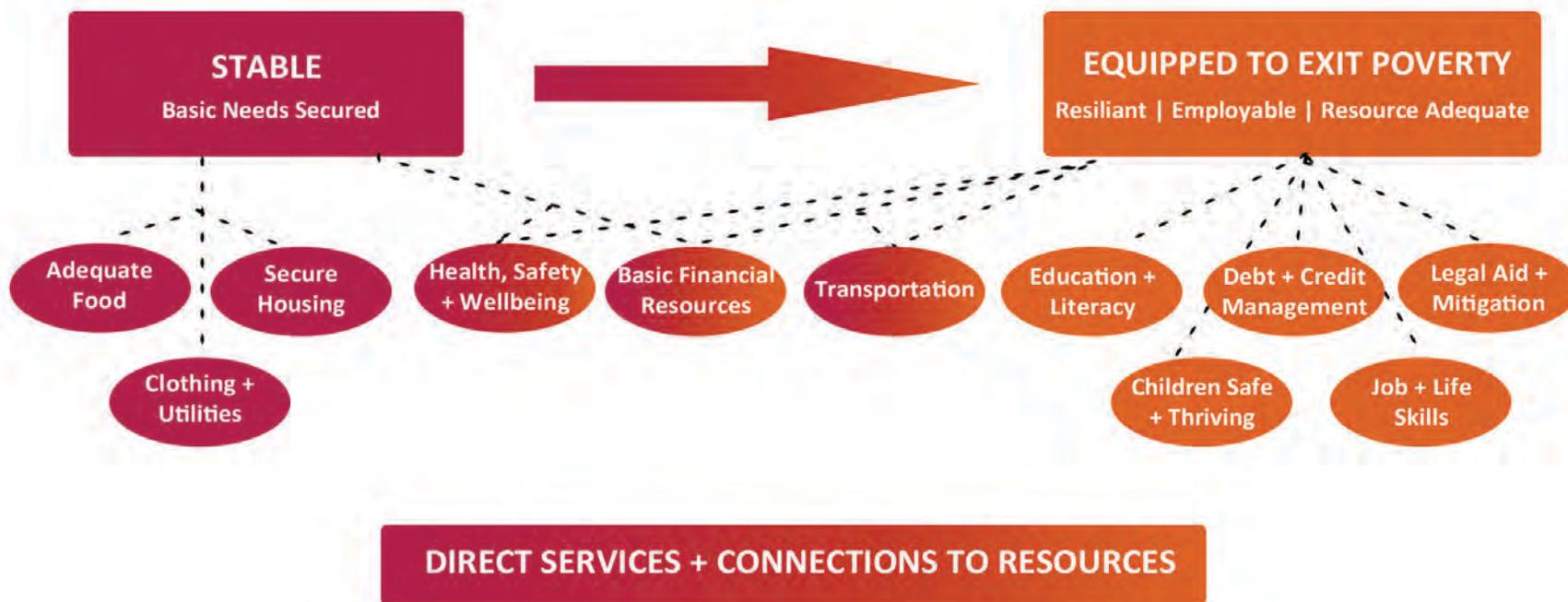
OUR MISSION



PHOENIX FAMILY EMPOWERS PEOPLE
LIVING IN LOW-INCOME HOUSING
COMMUNITIES WITH
**THE ON-SITE SUPPORT THEY NEED
TO GAIN STABILITY AND ACHIEVE SELF-
SUFFICIENCY.**

On any given day, Phoenix Family serves more than 6,000 children, adults, seniors, and people with special needs. Because we bring a full-spectrum of supportive services and programs into the communities where they live, we can have a greatest impact in helping them to gain stability and exit poverty.

HEALTHY AND STABLE CHILDREN, FAMILIES AND SENIORS.



A stable, safe home holds enormous possibilities for a low-income family striving to create a more stable future. Too often, the families we serve are just one crisis away from becoming homeless. And, like other low-income families, they need more than housing to overcome the barriers to success. They also need services where they live. Phoenix Family provides those critical on-site services. Our programs and services help residents to build on their strengths. As those skills grow, they experience the small successes that lead to the achievement of their goals.

In addition to individual case management services, Phoenix Family's programs and services fall into three main program areas: Financial Stability, Education, and Health & Wellness.

OUR IMPACT

5,720
PEOPLE SERVED

104,677
NUMBER OF SERVICES
AND PROGRAMS USED



FINANCIAL STABILITY

THE CHALLENGE

In 2021, nearly 95% of families served by Phoenix Family had an average annual income of less than \$9,000 - far below the \$57,000 required for a family of three to be economically self-sufficient in Kansas City.

Without a living wage, clients continually struggle with competing budget needs just to get by; often taking on debt and becoming more financially burdened over time. Access to long-term financial advice and income growth is often out of reach or not a high priority, as residents focus on short-term solutions to mitigate crisis after crisis.

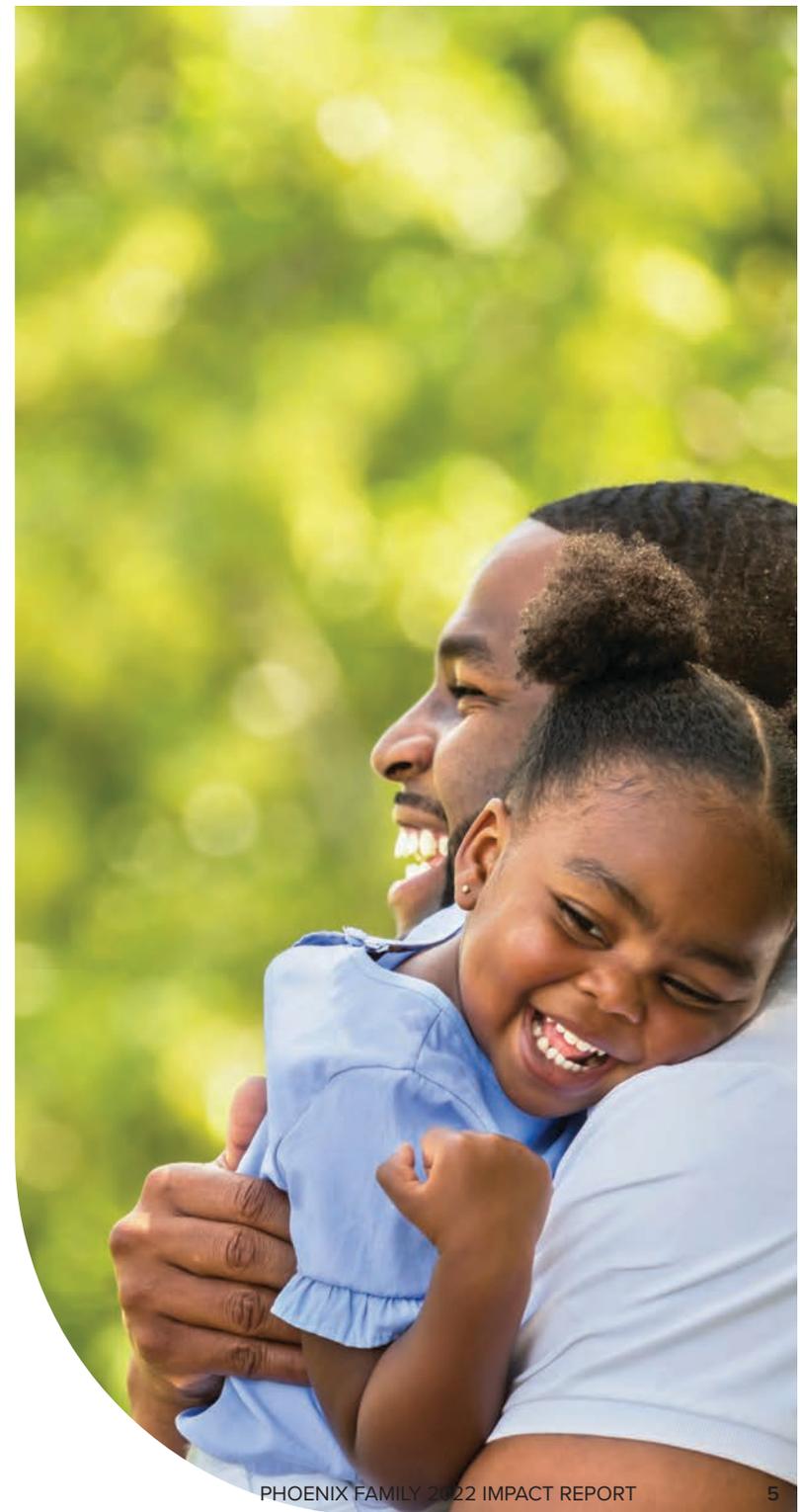
PHOENIX FAMILY'S ANSWER

At the very core of a family's stability is its financial security. Programs and services that Phoenix Family provides range from short-term emergency relief, such as financial emergency assistance and food and clothing pantries, to longer-term programs, such as eviction prevention programs, financial literacy, budgeting and employment services.

1,358 people received rent or utility assistance to help them avoid eviction and stay in their homes.

127,524 pounds of food were distributed to **2,578 families and seniors** through a Phoenix Family food pantry.

89% of households
maintained or established
stable housing.





EDUCATION

THE CHALLENGE

Education plays a key role in helping people to reach their full potential no matter their age. A recent study by the Southern Education Foundation shows that 30% of children raised in poverty do not finish high school. And those who do not earn a high school diploma by age 20 are 7 times more likely to be persistently poor throughout their adulthood.

PHOENIX FAMILY PROVIDES

Phoenix Family provides programs that help those we serve to build and enhance life skills. In addition to providing youth educational development through our HIKE program, Phoenix Family offers skill-building services for adults including programs for financial literacy, technology and job preparation.

377 adults participated in Phoenix Family's education programs.

103 adults attended literacy classes, received college prep assistance or attended GED classes to increase their education level and/or to finish their certification requirements.

1,240 adults and seniors attended community education programs. Topics included voting rights, women's support groups, American citizenship, and health management.

80% new HIKE attendees started the school year reading at least one year behind their grade level. By the end of the school year, 64% had increased at least one grade level with 18% reaching grade-level reading.

HEALTH AND WELLNESS

THE CHALLENGE

Economic inequality is increasingly linked to disparities in life expectancy across the income distribution, and these disparities seem to be growing over time. Additionally, low-income Americans have higher rates of physical limitation and of heart disease, diabetes, stroke, and other chronic conditions, compared to higher-income Americans. Americans living in families that earn less than \$35,000 a year are four times as likely to report being nervous and five times as likely to report being sad all or most of the time, compared to those living in families earning more than \$100,000 a year. These disparities emerge early in life and can be transmitted across generations.

PHOENIX FAMILY'S ANSWER

Since good health establishes the groundwork for a stable future, Phoenix Family's programs facilitate residents' access to healthy lifestyles programming, health insurance, health care, and preventive services to support residents in creating a healthy lifestyle.

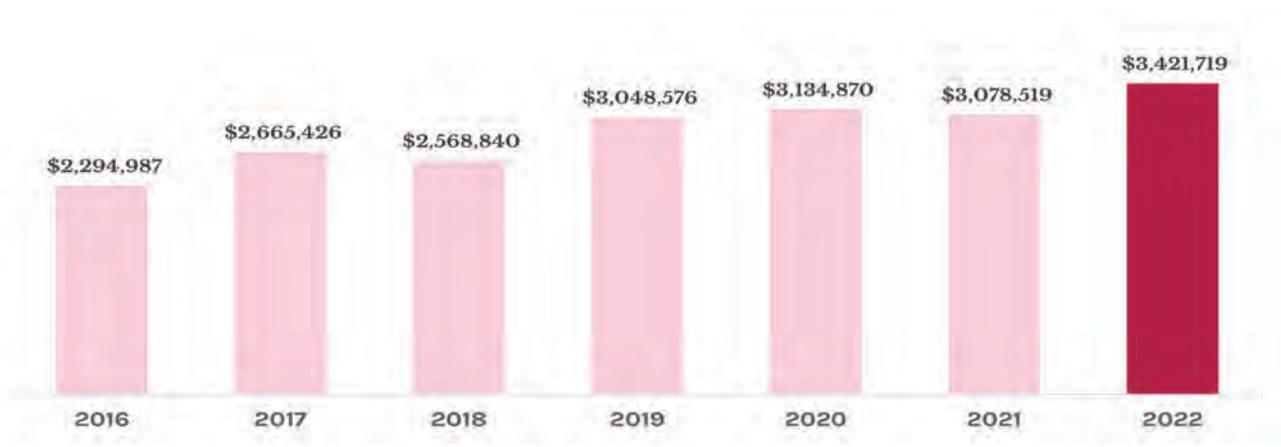
93% of seniors served participated in Phoenix Family's Healthy Lifestyles programming, helping them to lead active and healthy lives and increasing their access to health services and information.

648 adults and seniors received health checks in the community over the year, including blood pressure checks, audiology assessments, dental services and flu shots.

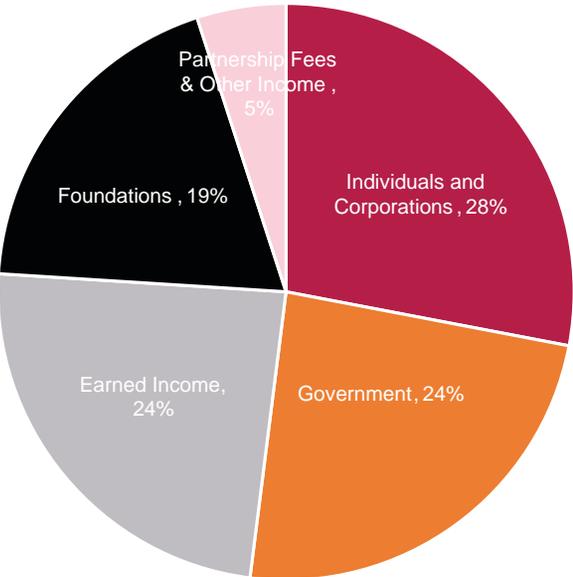
758 children, adults and seniors received assessment and medical assistance services.



FINANCIALS



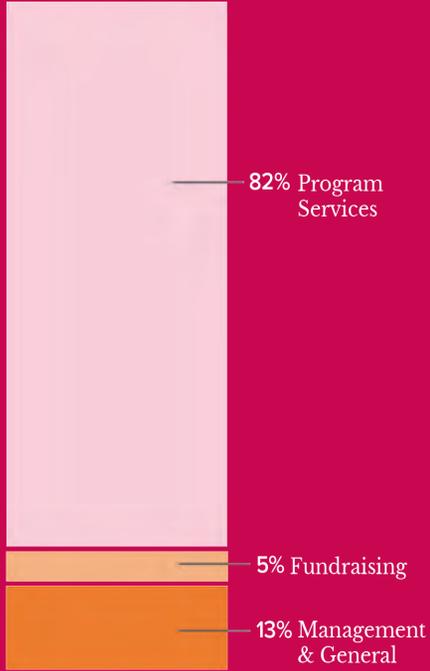
ORGANIZATIONAL SUPPORT



Our 2022 financial position continues to reflect investments in expanding programs and services to help children, adults, and seniors to gain stability and exit poverty. We also got better at doing things bigger and faster. As we start 2023, we start it with a renewed confidence in the strength of our model and vision for the future.

[Click here to view our full financial statements.](#)

EXPENSES IN PROGRAM, FUNDRAISING AND ADMINISTRATIVE CATEGORIES*



* Total investment of \$3.2 million.

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

FOR THE YEAR ENDED JUNE 30, 2022.

Assets	Unrestricted	Temporarily Restricted	2022
Current Assets	892,169	1,482,161	2,374,330
Developer fee, receivable, less current portion	15,685	-	15,685
Conditional promises to give, less current portion	10,000	-	10,000
Investments	125,000	-	125,000
Fixed Assets (net of accumulated depreciation)	8,520	-	8,520
Total Assets	1,051,374	1,482,161	2,533,535
Liabilities and Net Assets			
Liabilities:			
Accounts payable	23,590	-	23,590
Accrued expenses	238,238	-	238,238
Deferred revenue	209,000	-	209,000
Due to related party	379,335	-	379,335
Total Liabilities	850,163	-	850,163
Net Assets:			
Net Assets without Donor Restrictions	1,566,194	-	1,566,194
Net Assets with Donor Restrictions		117,178	117,178
Total Net Assets	1,566,194	117,178	1,683,372
Total Liabilities and Net Assets	2,416,357	117,178	2,533,535

CONSOLIDATED STATEMENT OF ACTIVITIES

For the year ending June 30, 2022

	Unrestricted	Temporarily Restricted	2022	2021
Public Support and Revenue				
Public Support:				
Individuals and corporations	423,995	-	423,995	420,997
Foundations and other organizations	-	319,797	319,797	520,201
Net revenue from special events	262,552	-	269,552	94,882
Other Support and Revenue:				
Paycheck Protection Program Loan Forgiveness	110,413	-	110,413	-
Service revenue	2,126,491	-	2,126,491	1,734,743
Partnership management fees	9,400	-	9,400	37,533
Interest and other income	616		616	24,725
Release of temporary restrictions	278,473	(278,473)	-	-
Total support and revenue	3,380,395	41,324	3,421,719	3,078,519
Expenses				
Program services	2,623,462	-	2,623,462	2,376,864
Management and general	445,894	-	371,449	424,189
Fundraising	191,551	-	164,319	228,940
Total expenses	3,208,539	-	2,990,248	3,029,993
Change in Net Assets	171,856	41,324	213,180	48,526
Net Assets, Beginning of Year, as originally reported	1,068,738	75,854	1,144,592	1,096,016
Restatement of accounting for deferred revenue	325,600	-	325,600	
Net Assets, Beginning of Year, as restated	1,394,338	75,854	1,470,192	1,096,016
Net Assets, End of Year	1,566,194	117,1782	1,683,372	1,144,592

CONTRIBUTING TO THE FUTURE

SUPPORTERS

\$100,000 & UP

Anonymous
Department of Housing and Urban
Development
East Hills Village
Missouri Housing Development
Commission
Parvin Estates
Phoenix Family Ventures, Inc.

\$50,000 TO \$99,999

AB Apartments Leasing, L.P.
Friendship Village
Greenway of Burlington Associates,
LP
John Calvin Manor
Oakland Heights
Olive Park Village
WellSky Foundation

\$25,000 TO \$49,999

Christmas Families
Curls Manor
John W. & Effie E. Speas Memorial
Trust
Lockton Companies, LLC
New View Apartments
Oak Grove Apartments
Palestine Gardens North
Parallel Senior Villas
Red Bridge Place
Ridgeview Heights
Sherman Family Foundation
Swope Ridge
Tremont Place

\$10,000 TO \$24,999

Bud Yarmo Social Fund
Columbia Square Town Homes
Condon Family Foundation
Evergy
GEHA
George H. Nettleton Foundation
Horizon Housing Foundation
IMA Foundation
Ina Calkins Foundation
Irven E. and NeVada P. Linscomb
Foundation Fund
Karen Daniel Charitable Fund
Ken and Wanda Eidson
Kids for Peace
Liz Wilson
Mark Garrett and Bob Wilcox
Matt and Carrie Condon
Matt and Lori Tritz
Menorah Heritage Foundation
Nowlin Hall
Raising Hope KC
Rich and Dana Reda
Ross Haynes and Mark Seely
United Way Of Greater Kansas City

\$5,000 TO \$9,999

Anonymous
Arvest Bank
Bishop Sullivan Center
Chouteau Square
Daniel and Jackie Sailer
David and Gina Harris
Jack and Jill of America Foundation

Jacob L. and Ella C. Loose
Foundation Fund
Jonathan and Carrie Cohn
Judge Cleveland F. Moulton
Christmas Poor Fund Trust
Karen Daniel
Kathy and John Schirger
Kelly Family Foundation
Landmark Towers
Olde Oak Tree
Palestine Gardens
Ridgewood Hills
Robert and Bettina Groh
Sarah and Matt Osborne
Stephanie and Thomas Scott
Steve Phillips and Amy McCarthy
The Yarco Companies
Tom and Amy Volini
Union Pacific Foundation
United Healthcare

\$2,500 TO \$4,999

Allied National
Autumn House
Blue Cross Blue Shield Of Kansas
City
Brett and Molly Lane
Brittany Court
Cameron and Lora Garrison
Community America Credit Union
Ed Enyeart
Erica Dobreff and Terry Gratz
Erin and David McDaniel
First Federal Bank of Kansas City
Great Range Capital LLC
Hallmark Cards, Inc.

Jake and Katie Lindmark
Jeff and Michelle Carlstedt
Kevin O'Rourke
Lathrop GPM
Majid and Melody Ghavami
Megan Toal
Pennie and Cliff Cohn
Rick and Pam Kahle
Royals Charities
Schofer Ladybug Fund - Fidelity
Charitable
Smithfield
St. Patrick's Manor
Thunderbird Apartments
Townhouse Apartments

\$1,000 TO \$2,499

Ameriprise Financial
ARCPT +
Ashley Simmons
Atherton Restoration Branch
Church
Bob and Donna Goodwin
Bob Cripe
Brandon and Maianh Laster
Brandon Scarborough
Brent Hankins
Brinshore Development, LLC
California Casualty Management
Co
Carina Criger
Central Bank of Kansas City Inc
Chase Johnson
Chris and Kelli Cooper
Claire Harrison

Columbus Park Plaza
David and Janet Houchen
Derek and Allison Sandstrom
Elizabeth Renz
Ellen Algrim
First Christian Church (Disciples
Of Christ)
Flo Harris Foundation
Francie Bradley
ISSCO, INC.
Jack and Lisa Cornelison
Jan Majercik
Jim and Rita Cooper
Jim Dalbec
Jimmy Edwards
Kansas City Southern
Karen Orosco
Katiana Hebbert
Kindra and John Jackel
Kristen Walker-Smith
Kyle Hartman
Lathrop GPM Foundation
Laurel Groh
Lee Ann Lowe
Leslie Kostner
Lisa and Chris Gunderson
Luke and Bridget Ismert
Marian Swagler-Stewart
Marlborough Manor
Matt and Kristen Zender
Matt Ankrum
Matthew Courtney
MetroNet Fiber Inc
Michael and Shannon Margherio
Michelle Oettmeier
Midwest Builders' Casualty
Moormeier Family Foundation

Nova R Wealth
Performance Contracting Group
Phillip and Anita Otto
Rachel Krantz and Edward
Goldstein
Ram and Radha Shankar
Ramsey Barhorst, LLC
Rebka Sakati
Sandra Raskin
Sandy and Jim Lavelle
Scott and Jan Berghaus
Service Management Group Inc
Stacy Harper
Steve and Kimber Givner
Sue and Gooch Denice
Terracon Foundation
Tria Health
Voya Financial
Walmart- Edgerton Fulfillment
Center

\$500 TO \$999

Abigail Walden
AdamsGabbert & Associates LLC
Altimate Medical Inc
American Academy of Family
Physicians Foundation
Amy Andrejack
Andi and Bret Bonge
Andrew and Carolyn Rogers
Anna Wiber
Bardavon
Beth MacLeod
Blair and Chris Cote
Bonham Family Charitable Donor
Advised Fund
Brooke Runnion
Calyx Peak Companies of Missouri

Cam-Dex Security Corp.
Centrus Health Kansas City
Cheatum Family Fund
Chris and Julie Nelson
Clayborn & Associates, LLC
Dad and Daughter 5K Run Walk
Dan and Deb Martin
Diane DeGroot
Donna Vincent
Dorothy Riviere
Doug and Susan Dickerson
Emily Henderson
Eric Givner
Erin Williamson
Grover Simpson
H&R Block
H&R Block Total Rewards and
System Team
Heather and Dax Pineda
Ilene Schwarz
Jan Grosscup
Jenny and Julian Bickford
Jessie Criswell
Jodi Lee
Joe and Debbie Drake
Joey Ford
Kacee Britton
Kamera Meaney
Kansas City Orthopedic Alliance
Karen Nielsen
Kathy Euston
Kecia Chappel
Kevin and Patti York
LaChondra Nevins
Lauren Robson
Lighthouse Legal, LLC
Mark and Sarah Dallas

Mark Rodrigues
Mary Burgess
Megan Snook
Melissa Williams
Michael and Katie Sanchez
Molly Rew
NFL Foundation
Piper Sandler Companies
Raye Pond
Rod Huttman and Diana Huttman
Sheila Gray
Stephanie Adams
Susan Simmons
Susie Yang
Terracon Consultants Inc
The Ultimate LLC
UMB Financial Corporation
Zach Thomas

\$499 AND UNDER

Abbott Laboratories
Abby Mueller
Adam and Whitney Walter
Adam Bogart
Aimee and Mark Larrabee
Aimee and William Ramirez
Alan Karchmer
Alicia Murillo
Allison Welch
Amanda Featherstone
Amanda Kannmore
Amazon Smile Foundation
Amber and Larry Crosby
American Family Insurance
Andrew Maschas
Angela Toussaint
Ann Wilkinson
Annie and Matt Riggs

Annie Simmons
Art and Diane Federman
Ashley King
Ashley Rieck
Ashok and Sravani Meka
AuBurn Pharmacy, LLC
Audrey White
Barbara Dater
Barbara Schwartz
Barry Cooper
Becky Haddican and Andrew
Houston
Beth Murano and Jim Ready
Bill and Cindy Foreman
Bob and Carla Schock
Brandon and Michelle McConnell
Brandon Scott
Brenda Greig
Brian Thiel
Brice McIver
Bridget Kromrey
Britt Gardner
Bruce Bower
Bruce Wilson
Caleb Kjergaard
Cara Adams
Carol Deshler
Carole Fraley
Carolyn Brewster
Carolyn Lacy
Carolyn Pooler
Casey Hanneman
Casey Redding
Catherine Moore
Chloe O'Brien
Chris and Felisha Parker
Chris and Jordan Kulesa

Chris Carle
Christopher Gregory
Cindy Tsutsumi
Cindy Walker
Clifford Schuette
Coach's Bar and Grill
Corey Hughes
Cynthia Parsons
Dan Jacobson
Darren Wright
Dave Aldrich
David and Deanna Allen
David Kricsfeld
David Nelson
Debra Fisher
Deke Clayborn
Denise and Callie Williams
Denise Kemp
Dennis Salzman
Douglas and Bonnie Pearson
Edith Ruiz
Eleanor Carr
Elizabeth and Anthony Monsees
Elizabeth and Lynn Lang
Elizabeth Blass
Ellen Gude
Elliott Hollub
Emily McCann
Eric and Amy Schotland
Erica Potter
Erin and Jeff Bradley
Eve Marsh
Farhana Ahmed and Mahveen
Ahsan
Felicia Gines
Fenaroli & Associates
First Presbyterian Church

Florence England
Freedom Wealth Advisors
Fritz Waldorf
Gabrielle Collins
Grace Tideman
Gregory Mosher
Hannah Rues
HCA Midwest Health System
Heather Novacky
Helen Nelson
Hilary Ortiz
Holly and Jason Perez
Idonna Bragg
Imajean Hubbard
Jacob Mogle
James Balsamo
James Rubottom
Janet Snyder
Janet Stone and Rick Coleman
Jason and Cindy Vogel
Jason and Darcy Carlstedt
Jason and Shelly Gibson
Jeff and Karla and Jeff Stouse
Jeff Daniel
Jeff Deshazer
Jeffrey Burnham
Jen Houston
Jenna Creek
Jenna Pukach
Jennifer Cartwright
Jennifer Herndon
Jennifer Kinder
Jess Jantz
Jess Michalek
Jessica Bond
Jessica Casselman
Jill and Michael Chalfie

Jill Minton
Jill Wehling
Jillian Bush
Joan Brown
JoAnn Lopez
Joanne Peden
Jody Rhoades
John Julian
Jon Norris
Jordan and Hayley McGee
Jordan and Stefanie Warzecha
Joshua Kean
Judy and Ted Graves
Judy Callahan
Julianna Drees
Julie and William Chabak
Julie Groff
Julie Weidner Moore
Kaley Wajcman Schwartzbard
Kama Moseley
Kansas City Gymnastics
Kara Eidson and Mike Lee
Karen Beshore
Karen Mitchell
Katherine Hasty
Kathy Hardman
Kathy Rogers
Katie Harrison
Kay Stinson
Kayla Fritz
KC Shepherd's Center
Kelly Gude
Kellye and Albert Lierz
Kelsey Page
Kevin and Joleen Jones
Kevin and Mary Cobb
Kevin McCann

Kimberly Ross
Konrad Hughes
Kristen Ornduff
Kristina Matthews
Kross Family Fund
Kseniya Beckley
Kyle and Amy Doege
Kyle Smiddy
Lane Swan
Larry and Lana Paul
Laura Cooper
Lauren and William Richards
Laurie and Mike Snell
Leann Leavene
Lee and Herndon Hasty
Leigh Blumenthal
Leilani Leighton
Lesley Tourville
Linda Buchanan
Linda Hansen
Linda Strode
Lindsay Larsen
Lisa Groh
Lisa Ledo
Lisa Monteleone
Liz Sosniecki
Louis Wade
Lynn and Chad Craghead
Lynn and Jeff Anderson
Lynn Vossen
Madison Stallbaumer
Marcia McDonell
Marcia Phares
Margaret and Bobby Williams
Marie McElfish
Marla Brockman
Marla Puente

Maureen Pio
Megan and George Heyns
Megan Pener
Melissa and Jason Henrich
Michael and Carrie Condon
Michael Berenbom
Michael Meier
Michelle Drake
Mickey and KC Carlson
Mike and Kelsey Ragsdale
Mike and Rebecca Gude
Mindy Muller
Mira Whang
Mitzi Swaffar
Myles Opdahl
Nancy Rusch
Nancy Shubat
Natalie and Jimmy Sevcik
Natalie Deneen
Nathan Lindsey
Nathan Shada
Nolan Dees
Pablo and Julie Palmeri
Pamela Barton
Patrice Shumate
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Paul and Karmin Debey
Paul Caestecker
Paul Fingersh and Brenda Althouse
Donor Advised Fund
Peggy Rose
Pete Thomas
Peter Brown
Peter Legaspi
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Ramona Palmer-Eason
Randy and Esther Wehner

Ray Pritchett
Rebecca Leith
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Rhonda Bruns
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Rob McCutcheon
Robert and Laura Redmond
Robert Lawrence
Robert Sherwood
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Rocky and Susan Horowitz
Rodrigo Lazen
Ronelle Neperud
Rosemann & Associates
Ryan O'Leary
Ryan Powell
Sally and Andy Sisk
Sally Shubat
Sally Woods
Sarah and Kris Auer
Sarah and Matt Russell
Sarah Briscoe
Sarah Freyman
Sarah McPherson
Sarah Otwell-Briscoe
Sarah Woodard
Sarah Zey
Sasha Azua
Scott and Molly Wymore
Scott Williamson
Seaboard Corporation
Selena Groh
Shalea and Ryan Walter
Sherri Mayer
Sherrie Weiss

Sophi McArthur
Stephanie Jones
Stephanie LeBlanc
Stephanye Doyle
Stephen and Marguerite Mouse
Stetson Phillips
Steven and Ellen King
Steven Barton
Susan and John Still
Susan Dawes
Susan Novotney
Susan Severin
Susan Woodbury
Suzanne Summerwill
Sydney Loethen
Sydnie Kerr
Tammy Zonker
Tanya Davis
Terri Kueser
Theresa Rich
Thomas Cox
Tina Butera
Toby Walton
Toni J. Tormanen
Traci Mogil
Traci Todd Murphy
Travelport
Trent and Dylan Cleary
Tri Nguyen
Ty Sheets and Libby Otto
Vivien and Daniel Schlozman
Donor Advised Fund
Warner Media
Whitney Walter

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Bardavon

Mark Garrett
Blue KC

David McDaniel
Holmeswood Baptist Church

Mark Seely
Lockton Companies

Karen Daniel
Community

Cameron Garrison
Lathrop GPM

Ramie Orf
Community America

Ram Shankar
UMB Bank

Erica Dobreff
Community

David Houchen
First Federal Bank of Kansas City

Sarah Osborne
Blue KC

Tom Volini
Colliers International

Ken Eidson
RBC Wealth Management

Rick Kahle, Chair
Investor/Business Advisor

Brandon Scarborough
Allied National

PHOENIX FAMILY OFFICES

Administrative Offices
Kansas City, MO

East Hills Village
Kansas City, MO

New View Apartments
Kansas City, MO

Parvin Estates
Kansas City, MO

Autumn House
Maryville, MO

Elsie Mason Manor
Des Moines, IA

Nowlin Hall
Kansas City, MO

Ridgewood Hills
Harrisonville, MO

Bainbridge Apartments
Kansas City, MO

Friendship Village
Kansas City, MO

Oak Grove Manor
Oak Grove, MO

Ridgeview Heights
Kansas City, MO

Brittany Court
Gardner, KS

Georgian Court
Kansas City, MO

Olde Oak Tree Apartments
Independence, MO

St. Patrick's Manor
Cameron, MO

Chouteau Square Towers
Kansas City, MO

John Calvin Manor
Lee's Summit, MO

Oakland Heights
Kansas City, MO

Swope Ridge Gardens
Kansas City, MO

Claudell Homes I & II
Columbia, MO

Landmark Towers
Liberty, MO

Olive Park Village
Kansas City, MO

Thunderbird Apartments
Harrisonville, MO

Columbia Square Townhomes
Columbia, MO

Ligutti Towers
Des Moines, IA

Palestine Gardens
Kansas City, MO

Tremont Place
Kansas City, MO

Columbus Park Plaza
Kansas City, MO

Linda Vista
Kansas City, MO

Palestine Gardens North
Kansas City, MO

Curls Manor
Kansas City, MO

Marlborough Manor
Kansas City, MO

Parallel Senior Villas
Kansas City, KS

