



empowering lives. shaping futures.

2013-2014 Annual Report



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LEADERSHIP

OUR MISSION: Providing people with disabilities and their families the resources and support they need to empower their lives and shape their futures.

2013 – 2014 was a challenging year those serving the needs of both children and adults with disabilities. With DD Waiver cuts and other proposed cuts in services threatening to severely negatively impact LifeROOTS' ability to provide the programs and services needed by so many individuals with disabilities throughout the community, one of our biggest priorities during that time period was to do whatever we could to try to stop these proposed cuts and restore funding and reimbursements.

Working closely with other agencies in the community, we embarked on a mission to raise awareness of the negative impact that these cuts would have on individuals with disabilities throughout the community – and engaged our supporters, and all those throughout the region, in a campaign to stop these proposed steep cuts from happening. Through social media and email outreach to our supporters -- as well as personal contact and meetings with legislators – we worked to not only raise awareness of the need to stop DD Waiver cuts from happening and the importance of rate increases, but helped to actually have an impact. Our work and strategic partnerships in this area helped to make a difference and, as you'll read about in our Adult Services summary, played an important role in the passage of Senate Bill 313/Genera Appropriations Act of 2014.

In addition to our work in ensuring that all those who need help can have greater access to our programs and services, we continued to make strides in growing all three of our divisions during 2013-14. Our Adults Day Habilitation program continues to offer important services for our clients at our Menaul and Rio Rancho locations, with our employment programs helping to provide our clients with important job skills and helping to place them in meaningful jobs throughout the community. In our Contracts and Business Services division we saw the continued growth of both our custodial and groundskeeping programs – with our Contracts Division now employing an average of 53 employees a month. We also continued to grow and enhance our Children's Therapy and Services division, expanding our Educational Playgroups Program due to community need and interest (now offering Educational Playgroups every day of the week) and raising awareness of our Early Intervention services to help those who can potentially benefit from these services for their children from birth to age 3. During 2013-14, we served 484 children – providing them with the critical programs and services that not only are valuable during these important childhood years but which are the “roots” to shape their futures.

With the important strides made surrounding the DD Waiver and renewed growth of our programs, we continue to move forward with our mission of “empowering the lives” and “shaping the futures” of all of those who can benefit from our services. We once again thank you for your continued support of LifeROOTS, as together we all work to provide those with disabilities in our community with the services that can dramatically enhance their quality of life.

Respectfully submitted,



Kathleen Cates, CEO & President



Catherine Salazar, Chairman of the

LETTER FROM THE CEO & PRESIDENT/ CHAIRMAN OF THE BOARD



LIFEROOTS SURVIVES, AND ONCE AGAIN BEGINS TO THRIVE, AFTER THE YEAR OF THE CUTS

During 2013-14, Development Disabilities Waiver (DD Waiver) cuts, as well as reassessment of needs through the Supports Intensity Scale (SIS) and subsequent cuts in services for disabled adults throughout New Mexico, were the source of much debate in New Mexico -- and played a major role in our programming and work in our adult services division. These DD Waiver cuts, which included cuts to supportive employment, included cuts as deep as 85% -- and were having a tremendously negative impact on so many individuals and families. In recent years, we have made tremendous strides in helping those with disabilities find meaningful jobs within the community; however, it was feared that -- if they weren't stopped -- these steep cuts to the DD Waiver would change all of that, and erase the progress we have made throughout the years. At the end of December 2013, a proposal was presented to the head of DDS for approval -- yet remained stalled for months, creating a scenario where it was feared that only the largest and strongest providers in the State (those big enough to absorb the loss caused by DD Waiver cuts) would be able to remain in the supportive employment field.

Understanding the urgency of the situation surrounding DD Waiver Cuts and cuts in services due to the new SIS scoring, LifeROOTS concentrated on efforts to engage the community and our supporters in stopping the DD Waiver cuts to ensure that all adults with disabilities have access to the services and programs they need. Kathleen Cates and Gwen Kiwanuka joined forces with other agencies to attend numerous meetings and speak about the issues being faced by families due to DD Waiver cuts, noting how inadequate reimbursement has forced LifeROOTS to cut back on supported employment and other services, and to work to convince the State to establish appropriate rates.

Our efforts, and the work of all agencies banding together to support rate increases for the DD Waiver program, resulted in an important development in March of 2014 -- when Governor Martinez signed off on rate increases for, among other things, the Developmental Disability Medicaid Waiver Program as part of the passage of Senate Bill 313/General Appropriations Act of 2014. This was an important, and much-needed, development for those with disabilities and their families -- who will now have greater access to the programs and services that can play such a significant role in enhancing quality of life. In addition, it was welcome news for all of us serving the needs of those with disabilities in our community -- and a great example of what can happen through the hard work, perseverance and combined efforts of all those who are advocates for those with disabilities in our community.

FACTS & FIGURES

- **Adults Day Habilitation (Menaul, Rio Rancho, Career Discovery and Literacy):** 92 Clients Served
- **Adult Employment Programs (development, training, placement and support):** 82 Clients Served
- **List of contracts including Job samples for this time period:** Greetings Inc., Southern Wine and Spirit, Ethicon, Supply One

ADULT SERVICES



EXPANDING AWARENESS OF EARLY INTERVENTION SERVICES ... AND THE EXCITING EXPANSION OF OUR EDUCATIONAL PLAYGROUPS PROGRAM

We have continued to grow our Children's Therapy and Services division to provide children with developmental delays and their families with the important services during this critical time period of their lives to help them reach their true potential. Our Early Intervention program continues to provide young children with the services so vital to their development, and we continue to receive many referrals, as well as conduct free screenings, in order to identify those that can benefit from our free early intervention services.

In particular, one program that has shown tremendous growth during 2013-14 has been our Educational Playgroups program. Originally launched in 2012, the LifeROOTS Educational Playgroups program is a unique concept designed to integrate typical and special needs children to practice school skills in a fun and nurturing learning environment. The program, offered for 2 and 3 year olds, helps to build important educational and social skills for both typical children and those with developmental delays, and has been growing in popularity since its introduction. Under the continuing direction of Grace Coca, a leader in early childhood education and director of the LifeROOTS Children's Therapy and Services division, the Educational Playgroups program has grown exponentially this past year – and we have expanded our playgroups to now offer playgroups every day of the week. The program continues to attract dozens of children both with and without special needs, where families are eager for this opportunity for them to play and learn together in the classroom setting in this unique learning environment. The program is led by bi-lingual teachers with experience not only in early childhood education of 2 and 3 year olds, but trained in special education, as well. The Educational Playgroup program continues to be made available at no cost for eligible children enrolled in the Family Infant Toddler (FIT) Program, and offered at a \$10 cost per session for children not enrolled in the FIT Program.

In addition, throughout the year we continued our efforts to build awareness about the importance of early intervention in children from birth to age 3, and what parents need to know about recognizing early signs of developmental delays. In conjunction with Autism Awareness Month in April, we embarked on an initiative to generate awareness of some of the early signs of autism and what parents should know in seeking a diagnosis and treatment, resulting in media coverage including a segment on 2 KASA This Morning featuring Stephanie Becenti, a development specialist and service coordinator at LifeROOTS families, along with one of our LifeROOTS families currently in our Early Intervention program.

FACTS & FIGURES

- 484 total children served through the Family Infant Toddler Program from July 1, 2013 to June 30, 2014.
- LifeROOTS is a member of the B4-3 collaborative of early intervention nonprofit providers in Central New Mexico. The FY 2013-14 is the first year this successful collaborative has been formed to better serve the needs of families in the central New Mexico area. This collaborative effort is funded by a generous grant from United Way of Central New Mexico.

CHILDREN'S THERAPY & SERVICES



LIFEROOTS GROUNDSKEEPING AND CUSTODIAL JOBS PROGRAMS CONTINUE TO BRING JOBS ... AS WELL AS BETTER, CLEANER ... AND MORE BEAUTIFUL BUILDINGS AND HOMES!

LifeROOTS continues to grow our contract and business services division, adding new jobs and contracts in both the custodial and grounds keeping areas. These positions not only provide meaningful employment for our LifeROOTS clients, but also provide them with important training and skills related to chemical usage, equipment and nationally standardized processes.

We continue to grow our custodial program, with positions available at entry level, federal contracts with federal benefits, private sector or government jobs. Many of our custodians have worked on a contract for 5 to 15 years, and many need to achieve a Secret or Top Secret clearance to maintain access into the areas they clean. Their consistency, low turn-over rates and credibility have made them trusted members of governmental sites – and have resulted in additional opportunities for expanded custodial work. The skills needed to perform their duties include learning sequential tasks, recognizing if a chemical or equipment change is needed to address issues, and keeping up to date on the latest national standards and techniques. As our custodians' skills grow so do their opportunities to learn specialized skills, with a number of our custodians who have expanded their skills and abilities subsequently offered Crew Lead and Supervisor positions.

Our groundskeeping program continues to not only provide important employment opportunities for LifeROOTS clients and keep many landmarks throughout the region beautifully landscaped, but also has received national recognition. Our groundskeepers continue to beautifully maintain the grounds of the Federal Courthouse, a 3 1/12 acre, LEED's certified landscaping that is nationally recognized. Our grounds keeping crews maintain eleven UNMH sites located around central New Mexico, as well as other governmental, commercial and residential properties. The groundskeeper's training includes: the use of power equipment safely and effectively, repairing irrigation systems, fertilization techniques and specific planting techniques (such as trees). In addition to the numerous grounds keeping contracts LifeROOTS continues to maintain, our LifeROOTS grounds keeping team also is helping local residents throughout the region beautify and care for their yards. This past year, LifeROOTS grounds keeping team members were out in full force helping to add "life" to some local yards – garnering thanks, and praise, from many local residents who witnessed first-hand how LifeROOTS worked diligently, and skillfully, to help transform their yards.

We are happy to be continuing to provide LifeROOTS clients with experience on both the groundskeeping and custodial crews that can prepare an employee for long term employment working for a large commercial custodial, groundskeeping company or as an independent contractor on their own. As we continue to grow our Contract and Business Services division and secure additional contracts, we look forward to providing even more opportunities for our workers in these areas.

FACTS & FIGURES

- LifeROOTS Contracts Division employs an average of 53 employees a month.
- An average of all contracts from the Contracts and Adult Community Service Divisions must maintain an average of 75% of their direct labor as individuals with disabilities certified at the federal level.
- Before and after photo of a grounds keeping project

CONTRACT & BUSINESS SERVICES



BEFORE



AFTER



BEFORE



AFTER

Contracts for Custodial, Grounds Keeping, Landscape Design and packaging and assembly work for 2013-14

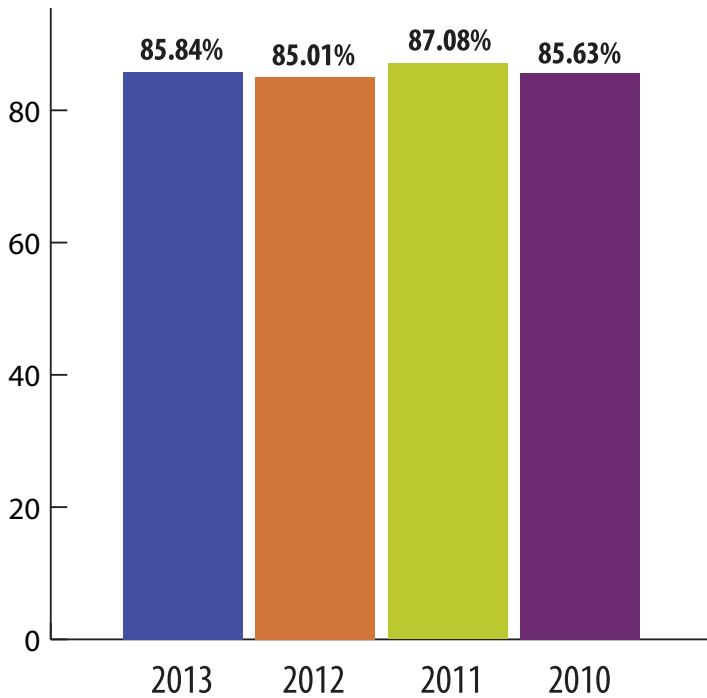
- Ethicon (A Johnson & Johnson Co.)
- Military Forces Feature
- Southern Wine and Spirits
- Kirtland Air force Base
- National Assessment Group (Federal Government)
- Defense Threat Reduction Agency (Federal Government)
- Albuquerque Police Department (Prison Transport)
- Action Disabilities Representatives
- The ARC
- Grace Coca
- Pete Domenici Federal Courthouse
- Saggios
- Mary Pafford
- Shirley Baty
- Gina Gonzales
- Johnny Estrada
- Jim and Victoria Hontas
- Greetings Ect
- City of Albuquerque
- Judy MaCarver
- Juanita Lovato
- Amy Mathis
- NM Commission for the Blind
- Quality Yarns
- Action Disabilities Representatives
- Workforce Compensation Agency
- NM University Hospital
- Lucy Rosen
- Joan Schofield
- Norine Richards
- SupplyOne

FINANCIALS

HIGHLIGHTS

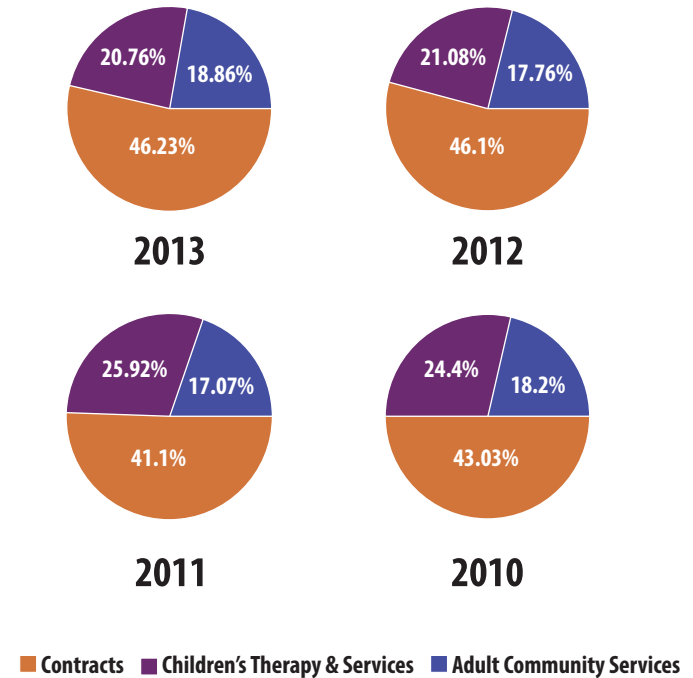
- **Total Assets:** \$3,881,065
- **Total Liabilities:** \$ 2,127,646
- **Total Net Assets:** \$ 1,753,419
- **Total Revenue:** \$6,698,454
- **Total Expenses:** \$ 6,791,972
- **Change in Net Assets:** \$ (93,518)

PROGRAM EFFICIENCY



For every \$1.00 we earn , LifeROOTS spends over \$0.85 cents on direct program expenses.

DIVISION EXPENSES AS % OF TOTAL EXPENSES



The political, social and economic changes forced many nonprofits to file for bankruptcy from 2008-2010. LifeROOTS has focused on increasing the Contracts Division as they are a fee for service division and not as dependent on government programs as the other 2 divisions. Diversifying revenue streams in the Children's Therapy and Services and Adult Community Services is part of LifeROOTS 5 year strategic plan as well.

DONORS & CONTRIBUTORS

Sylvia Padilla
Jeannie Vigil
Rio Rancho Rotary Club (afternoon)
Joan Schofield
Ms. Carol Epstein
Bran Vaughn
Mr. and Mrs Mike Arnold
Mr. Patrick Mulloy
Ms. Aimee Bustos
SourceAmerica
Perfecto Gutierrez
Nancy Kreutzer
Holly Bronson Kolowski
Brett Eddington
Kathleen Holmes Cates
Dian Candelaria
Robert Diefenbaugh
Myron Saldyt
Kelly Lowenstein
United Way of Central New Mexico
Community Fund
Linda Geiszler
Diva D'Luxe

Kimberly and Scott Schnepfer
Trudy Eberhardt
Carol Guerra
Gallopig Grace Youth Ranch
US Bank
American Express
Global Classroom
Bobby Joe's Auto Service
Ramona Temple
David Baland
Whole Foods
Barbara Black
Carl J. Anderson & Marie Jo Anderson
Charitable Foundation
Cheryl Lucero
Pammy L Araya
Dan March
Brady Industries of NM
Madaline Yazell
Amy Clithero
Lynda Kitts
Maria Salgado
Western Organics
Dr Leslie Strickler and Brent Strickler

Carol and Alfred Guerra
Allstar Insurance
Gwendolyn Kiwanuka
Loni Alarid
Stephanie Hurd
Frank Chandler
Grace Coca
Cathleen Corlew
Lily Duran
Maria Garcia
Sarah Lancaster
Mathew Molina
Fay Pepin
Catherine Salazar
Charles Salazar
John Sena
Gloria Silva
Sandra Silverman
Kevin Stamber
Teresa Torres
Nicholas Trujillo
Jane Wright

WAYS TO GIVE

LifeROOTS can't achieve its mission without your help. Please consider making a gift that will have a real impact on the lives of people with disabilities. If you want your gift to go to a specific program or service, please let us know when you make your donation. Or you can make a gift of your time and show your support for the center by volunteering.

In-Kind Donations

Your donations of office equipment, children's toys, art supplies, professional services, event tickets, dinner coupons, store gift cards and other items allow LifeROOTS to utilize more of its financial resources in support of the programs and services we provide to the disabled community.

Planned Giving

Leave a lasting legacy that will help LifeROOTS fulfill its mission into the future. Planned giving allows you to plan your estate resources to serve your family and the charitable organizations you care about most after your death. Although there are literally hundreds of ways to plan gifts, the most common is to stipulate a bequest in your will. Bequests are perhaps the simplest manner in which to leave your legacy with LifeROOTS.

Make a donation online

Visit LifeROOTSnm.org

Click on the Donate link at the top of the page

Select how you would like to contribute

Make your donation by Visa or MasterCard

Make your donation in person or on the phone

Call 505-255-5501 to find out how

Executive Team



Kathleen Cates
CEO



Gwen Kiwanuka
Director of Adult
Services



Trudy Eberhardt
Director of Finance



Patrick Mulloy
Director of Contracts



Maria Chadwick
Director of Human
Resources



Sylvia Padilla
Director of Quality
Assurance



Grace Coca Director of
Children's Therapy and
Services and



Robert Diefenbaugh
Director of Safety, Facilities
and Fleet

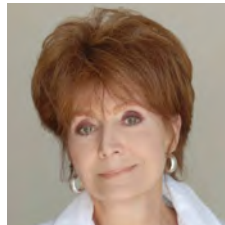
LEADERSHIP

Board of Directors

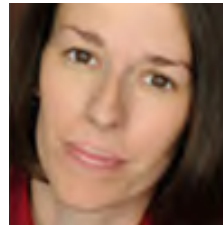
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Board Chair



Carol Guerra
Vice Chair



Dr. Leslie Strickler
Secretary



Myron Saldyt
Treasurer

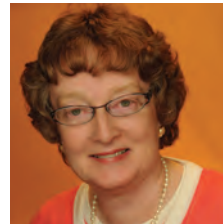
Board Members:



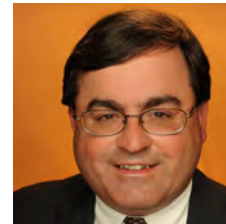
Jeannie Vigil



Amy Clithero



Linda Geiszler



Brad Vaughn



Joan Schofield, MBA



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