

RISING ABOVE COVID

Annual Report 2020

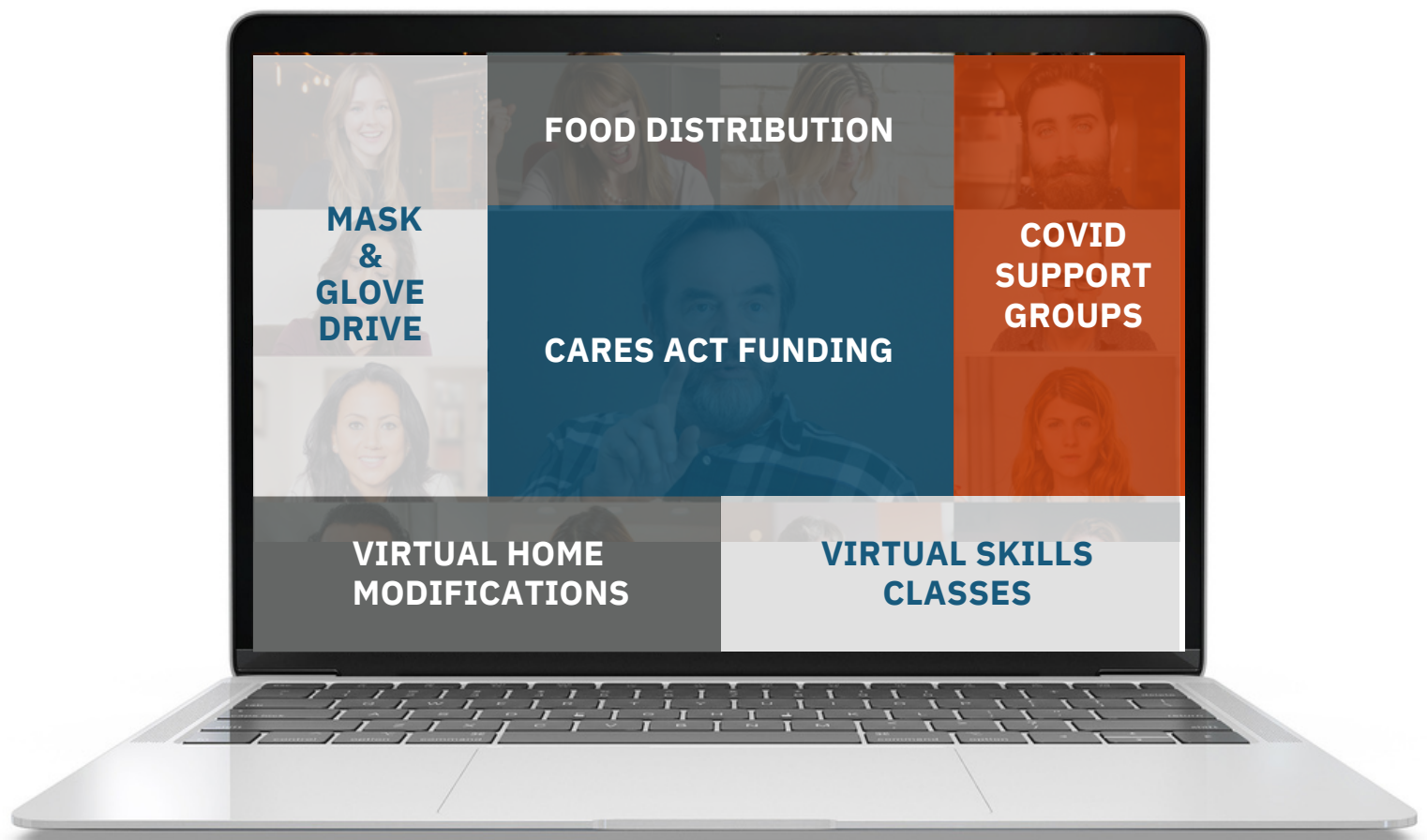


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FROM the PRESIDENT of INDEPENDENCE FIRST, MARCI BOUCHER

2020 was the year of pivoting, perseverance, and resilience.

Never before has the modern world been faced with the challenges this year brought. The pandemic hit everyone in one way or another, and many found themselves in a fight for survival.

As we rushed to help those in dire need, our agency immediately adjusted internally for the health and safety of employees and consumers.

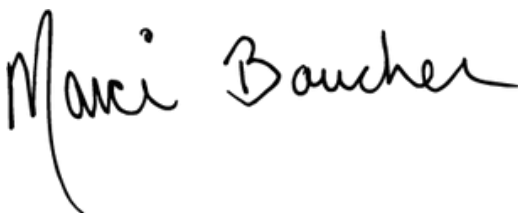
We quickly discovered that gaps in access and use of technology posed a barrier to connecting with many of our consumers via online platforms. In response, we supplied those in need with devices and hotspots so they could participate in online offerings. Other direct assistance provided to consumers during the pandemic included addressing urgent needs for food, sanitary items, housing/rent assistance, help paying utility bills, and transportation.

One of the families we assisted during this time was Cartrel's family. He was a young man with a disability. COVID-19 caused extreme hardships for him and his family. Cartrel's mother lost her job due to COVID-19 and the family faced eviction, which is when they turned to Independence First for help. Our staff discovered much more. Cartrel was diagnosed with COVID-19 at which time he was sharing a bed with his younger brother. Independence First worked with the family to help Cartrel get a private bed, an oven, stock the pantries, provide rent assistance, and transportation to and from the doctor. On the brink of homelessness, Cartrel and his family were able to stabilize, survive, and later thrive with help from Independence First.

Despite the challenges surrounding COVID-19, our agency was able to maintain its regular hours of operation, even while staff transitioned to remote work. Independence First increased the distribution of masks and gloves to personal care workers. We provided benefits counseling, cooking classes, peer support groups, summer workshops, Christmas gift-making classes, one-on-one goal setting, assistive technology demonstrations, a program diverting people from institutional life and helping those who want to leave institutions return to the community, provided information and referrals, and home modification assessments. We even unveiled a new logo, with the Independence First initials signifying a person reaching out, as our staff so often does.

The resilience of staff, consumers, and community supporters made it a very successful year. From all of us here at Independence First, we thank you!

Marci Boucher



President and CEO
Independence First



MESSAGE FROM THE BOARD CHAIR, SCOTT LUBER

Greeting from the Board

It's been 22 years since I have been Board Chair of Independence First. A lot has changed. Our revenues were \$10 million and we served approximately 1,300 consumers. In 2020, our revenues were over \$31 million and we served approximately 5,195 consumers. But the biggest change in 2020 was the Covid pandemic.

Under the leadership of CEO and President Marci Boucher and her management team, Independence First continued to provide services to people with disabilities in a new way. Much was done remotely – meetings, classes, trainings and more – to keep everyone safe.

Independence First received funds to provide assistance to people with disabilities during the pandemic. This assistance was everything from help with rent, groceries, and PPE. We also were able to purchase computers and internet services for those in need so they could stay connected.

Covid did not keep the Board of Directors from maintaining their oversight of the agency. We continued all regular Board and Committee meetings through video conferencing to ensure our support and guidance to staff so they could continue to provide a high level of service to people with disabilities.

2021 should be another year of transition, as vaccines are being administered and the pandemic will hopefully ease, the Board and staff are looking at ways to safely get back to in-person services. The safety and well-being of our staff and consumers remains and will always be, of utmost importance.

I want to take this opportunity to thank all of our donors, volunteers, staff, Board and consumers for all their support of the organization during this tough year, and in years to come.

My hope is that in 2021 the pandemic eases and allows us to get closer to normal lives. Stay healthy and safe.

Warmest regards,
Scott Lubber
Independence First Board Chair



PIVOTING DURING the PANDEMIC

A generous grant from Bader Philanthropies in 2020 allowed us to expand our Assistive Technology program with the creation of our Ageless Independence Center. Ageless Independence was designed to offer seniors with disabilities, their care givers, and health care professionals, hands-on opportunities to discover the potential assistive technology has for facilitating healthy aging in place.

To be independent to the maximum extent possible, people need to be able to care for their own needs and perform daily tasks safely. For seniors with disabilities, many activities have become either impossible or extremely difficult and time-consuming to perform independently. To make these activities possible, assistive technology can often be employed. That's where our Ageless Independence Center comes in. The Center features dozens of pieces of Assistive Technology equipment designed to assist seniors with common barriers such as mobility, self-care, communication, vision, and safety. Equipment collections include drinking containers, therapeutic glasses, accessible health monitoring instruments, dementia reference material, dementia technology, and transfer and fall recovery aids.

By providing visitors with equipment demonstrations, loan trials, and/or advice about reputable vendors, we can help them to overcome the common barriers that could lead to a loss of independence. Our goal is to present accurate, unbiased information about all options, helping seniors choose the most compatible and cost-effective options for maximizing their independence and quality of life.

The Ageless Independence Center also allows us to offer continuing education opportunities to service providers and medical personnel who commonly interact with seniors to increase their efficacy and awareness of options as well as allowing us to work with Occupational Therapy and Physical Therapy students on the equipment so that as they enter the workforce they will be able to impart this knowledge to countless seniors looking to maintain their independence.

Due to health and safety concerns surrounding COVID-19, we have not yet been able to open Ageless Independence to the public for in-person visits. We have done several virtual tours of the program for people with disabilities, families, and professionals. We have also used several of the items for virtually training over 100 Occupational Therapy students from two different universities and several of our Personal Care Workers in training. We have even presented virtually at a statewide conference!



HIGH SCHOOL PERSONAL CARE WORKER CLASS

Director of Personal Assistance Services Kathy Acevedo by Telemundo about the PCW Training program expansion

Independence First launched the pilot program for its Personal Care Worker class for high school students during the 2020–21 school year. The program took place in partnership with Seeds of Health (an agency designed to address health and educational needs of Milwaukee-area women, adolescents, and children), and Grandview High School. Grandview serves students at-risk of not completing high school or who are experiencing difficulty in a traditional high school setting.

The class was open to all students 16-years of age and older interested in becoming personal care workers (PCWs). PCWs provide assistance with activities of daily living tasks and domestic assistance for disabled or elderly individuals, allowing these individuals to remain living independently in their own homes.

Fifteen students enrolled in the 12-week course taught by Robin Becker BSN, RN, Independence First Personal Assistance Services RN Program Manager. Three of the agency's Registered Nurses served as supplemental instructors. Program support was provided by Cencreaha Bowman, Caregiver Recruitment, Training, and Support Coordinator.

The curriculum's foundation was based on the 11 basic activities of daily living (ADLs) direct care workers need to understand and apply in order to deliver maximum standards of care. Additional information about infection control, Personal Protective Equipment, safety, body mechanics, and general emergency preparedness was covered. Because of COVID-19, the first 10 weeks of the class took place virtually via Google Classroom. The last two weeks of the class were held in-person at Independence First with half of the class attending week 11 and half the class attending week 12 in order to take their skills assessment. While at Independence First, the students took a tour of the facility that included our Resource Center, home to our Assistive Technology program. We have secured a grant from the United Way of Greater Milwaukee and Waukesha County to continue this program during the 2021–22 academic year.

The program serves students like pilot class participant Crystal. Crystal's mother is terminally ill. "Mom is a cancer survivor-- two-times," explains Crystal. "And now she has a tumor. We don't have anyone else around so it falls on me. With training I know I am providing correct and informed care." Crystal adds that she is excited that this training will mean a job right out of school with the chance to grow in healthcare field.

2020–2021 BOARD of DIRECTORS

1. Scott Lubert–Chair–Community Volunteer/Advocate
 2. Billie Torrentt–Vice chair–Chief Operations Officer at GPS Education Partners
 3. Tom Rave–Treasurer–Retired from Banking–First Wisconsin, Wells Fargo, Tri City, and Economic Development–Airport Gateway Business Association, Milwaukee Gateway Aerotropolis
 4. Kim Marggraf–Secretary–President/Owner, Marggraf Meeting Management
 5. Judy Haugland–At Large–Community Volunteer
 6. Karen Hunt–At Large–Director of Development–Seeds of Health
 7. Jason Ostrowski–At Large–Retired from WE Energies, ProHealth Care Volunteer
 8. William Crowley–Attorney, Disability Rights Wisconsin
 9. James Guckenberg–Attorney, Halling & Cayo, S.C.
 10. Brad Holz–Retired from Direct Supply, Inc.
 11. Deanna Tillisch–Community Volunteer
 12. Paul Wierzba–Field Vice President, Field Consulting Services of Mutual of America
 13. Joanne Williams–Milwaukee PBS & C–Bird Productions
 14. Tiffany Wynn–VP of Marketing and Communications at Carroll University
-

LIST of DONORS

Thank you for your generous support of our mission

Donors \$10,000+

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Bader Philanthropies
BMO Harris Bank
Craig H. Neilsen Foundation

Greater Milwaukee Foundation–
Eugene J. Hayman Independence First Fund
Rockwell Automation
United Way of Greater Milwaukee & Waukesha County

Donors \$5,000 – \$9,999

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Stackner Family Foundation

Donors \$1,000 – \$4,999

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Robin Muller
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Clare M. Peters Charitable Trust
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Deanna and Eric Tillisch
We Energies Corporation Foundation
Wochinske Family Foundation, Inc.
Kim Wynn

Donors \$500 – \$999

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Greater Milwaukee Foundation
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Scott Nelson
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Billie Torrentt
Debra S. Wanger
Steven Zakrewski

LIST of DONORS (cont.)

Donors \$100 – \$499

Anonymous	David Riemer
Diane Braza	Elizabeth Roberts
Joan Brenk	Ron Rodriguez
Cynthia G. Brown	Tina K. Roehr
Caty and Eric Bulgrin	Sandra Rubin
Kacie and Jeff Cooke	Myra Sanchick
Maria and Dennis Dabel	John Schmid
Ellen Daroga	Mary Schnell
Yoshiko Dart	Chuck Smith
Andrea Dee	Roger Smith
Laura Emir	Southern WI Interpreting & Translation Services, Ltd
Durant Family Fund	Special Editions, Inc.
Peggy L. Famularo	Stan Spence
GE Foundation Marching Gifts Program	Karen Stiles
Roxanne Gebhard	Tracy Thomas
Joan Gigl	Jesse Waukau
Grebner Family Charitable Fund	Waukesha County Community Foundation, Inc.
James Guckenberger	Paul Wierzba
Judy Haugslund	Kelly Wochinske
Robert G. Heffron	Tiffany Wynn
Herb Kohl Philanthropies	David Zaniewski
Linda Hoelz	Patricia and Robert Zweber
Margaret James	Honor & Memorial Gifts
Barbara Joyce	In Honor of Ron Jodat
Elaine Klister	Joan Brenk
Darlene Kramer	In Honor of Jeannette Cooke
Bridget and Pat Lafferty	Kacie and Jeff Cooke
Deb and Tom Langham	In Honor of Marci Boucher
Peggy Lee	Ellen Daroga
Thomas Lindow	In Honor of Kathy Meisner
Scott Lubber	Deb Langham
Jerry McCloskey	In Memory of Martha Valerio
Dean Muller	Durant Family Fund
Elaine and Howard Myers	In Memory of Richard Barthel
Bob Noel	Betty and Ed Eich
Joseph Olson	Barbara Joyce
Roxan Perez and Tobie Tyler	In Memory of Tobi Friesler
Richard Pieper	Elaine Friesler
Victoria Popp	In Memory of Joyce C. Smith
Joy E. Rader	Allison and Dale Smith
Thomas Rave	

THE DISABILITY VOTE 2020 and INDEPENDENCE FIRST



Media interviewing rep from City of Milwaukee at Independence First

It started out as an exciting political year for Milwaukee. Our city was chosen for the Democratic National Convention, with the hopes of bringing tens of thousands to Milwaukee for the event, including media from across the world.

Independence First was poised to be a major player and advocate for voting rights for people with disabilities.

Our agency worked with the City of Milwaukee Election Commission to provide an accessible polling location. The unique accessibility of Independence First's Walker's Point building became an exciting option for voters with disabilities. Milwaukee officials showcased their accessible voting machines at Independence First, allowing low vision voters to more easily cast ballots, as well as people who use wheelchairs. In the summer election, the Independence First polling location offered this accessibility and demonstrated this need to the media.

With the Democratic National Convention approaching, Independence First did additional preparations to put disability issues before the national platform. The agency partnered with researchers at the University of Wisconsin-Milwaukee who developed an app, which rated Milwaukee restaurants and other facilities as to accessibility. Volunteers gathered at the agency and went out into the city in teams to view various sites and make recommendations. The app was an interactive one, allowing new users to comment and share their experiences.

While the pandemic curtailed the scope of the Democratic National Convention in Milwaukee, Independence First had a strong presence with billboards and bus shelter messages that surrounded the city's Convention Center. The messaging reminded attendees of the importance of the Disability Vote.

NEW PARTNERSHIPS



ALL-TERRAIN CHAIR

Independence First partnered with Outdoors Access 4 All! to offer an All-Terrain Chair, on loan free of charge for people with disabilities. This chair helps the user hike along trails, fish in up to six inches of water, and cruise the beachfront. The specially stabilized chair has tank-like treads instead of wheels. Outdoors Access 4 All! facilitates and provides the means for all to enjoy our natural resources and partners with agencies in Wisconsin to offer these special chairs. Heather, who is using the chair in the photo, says she had a blast and never thought she'd be able to go on the beach. Yet here she was, enjoying Milwaukee's lakefront.

FOOD DISTRIBUTION

The agency teamed up with the Hunger Task Force to offer a monthly Food Distribution for those who face food insecurity. Volunteers from corporations and educational institutions in the community joined Independence First and Hunger Task Force volunteers to provide nutritious food to hundreds of people with disabilities. The Food Distribution became a "contactless" event during the pandemic with volunteers placing the food in trunks as cars drove through the lot at Independence First.



ILLUMINATE OZAUKEE

Ozaukee Nonprofit Center (where the Independence First Grafton Satellite Office is located) was excited to announce the creation of "Illuminate Ozaukee"-- a drive-thru celebration of the holiday season and our community. For thirteen nights during November and December, the Ozaukee Nonprofit Center and participating businesses and nonprofits turned Zeunert Park in Cedarburg into an "enchanted nonprofits forest" winter wonderland of holiday lights. Independence First joined other local nonprofits in designing a unique tree. Consumers of our agency created the ornaments for the Independence First tree. Visitors were invited to wind through the park in their vehicles while enjoying the twinkling lights of the season and learn about the various nonprofits of Ozaukee County.

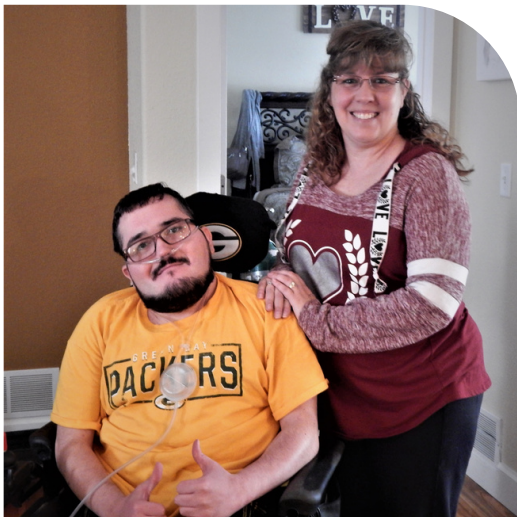
NEW PARTNERSHIPS

VIRTUAL CLASSES

In addition to consumer and caregiver classes pivoting to online platforms during the pandemic, our professional teaching programs went virtual. Independence First experts Cindi Pichler and Mark Smeiska staged a three-camera production at the agency to demonstrate assistive technology for people with disabilities, to occupational and physical therapist students at UW-Milwaukee and Mount Mary.



TWO INDEPENDENCE FIRST FAMILIES



JOE & KATIE

Katie cares for her son Joe who was born with Spina Bifida and her stepson Jonathan, who has Cerebral Palsy. Katie believes it's important that she be able to be a primary caregiver for the young men, and they continue living in their parents' home. "So they have their independence, they have their freedom", says Katie. "I think them feeling safe, having dad and I so close, helps the boys feel 'I'm OK - I know I'm OK.'"

As a Personal Care Worker for Independence First, caregivers have the flexibility of getting paid to care for loved ones. It's an option that provides loving care in the home from those who care most, and keeps people with disabilities living in their homes instead of institutions.

MAGGIE

Maggie and her husband Michael came to Independence First after Maggie got a life-changing diagnosis. She faced many challenges with a degenerative condition called ALS. The experts at Independence First were able to show Maggie and Michael various assistive technology devices that could help her maneuver life in her home as her muscles weakened. Our staff visited their home to give suggestions on home modifications that could make her life easier. Maggie said, "I think of just driving down 1st Street and seeing Independence First and knowing for years and years, as a Milwaukeean, that they provided a lot of great services to people with disabilities. So we just immediately called them and knew they would be helpful to us."



WHO WE ARE



Independence First is an Independent Living Center, an organization created to be run by and for people with disabilities. We provide a continuum of services as well as offer support, advocacy, and information on empowerment and attaining independence.

We believe that people with disabilities should have the freedom to control their own lives and we are committed to their full inclusion in every aspect of our community. Over 50% of our staff, managers, and Board of Directors have disabilities themselves, providing a peer approach that leads to excellent outcomes.

WHAT WE DO



Independence First provides services for people with disabilities of all kinds, in all age groups. Our five core services are:

- Independent living skills training
- Information and referral
- Peer support
- Advocacy
- Transition

We offer over 20 Independent Living Programs:

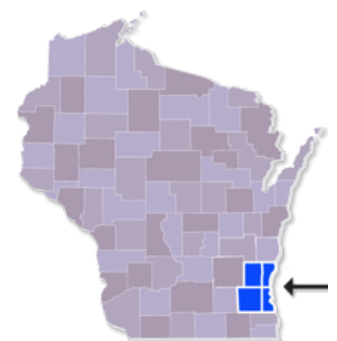
- Youth leadership activities
- Summer Workshops
- In-School Curriculum
- Assistive technology resources and assessments
- Benefits Counseling
- Teaching at Milwaukee Public School – Courses for youth
- Arts and Crafts
- Business Accessibility Assessments



We also offer in home Personal Assistance Services to help people remain independent in their homes

WHO WE SERVE

In 2020, we provided in-depth services to 2,885 people with disabilities in Milwaukee, Waukesha, Washington, and Ozaukee counties. An additional 2,310 individuals received information and referrals. The majority of those we serve have household incomes below \$25,000



STATEMENT of ACTIVITIES

Year end December 31, 2020

32M TOTAL REVENUE

U.S. Department of Health and Human Services

ACL Centers for Independent Living	359,771
ACL Centers for Independent Living COVID-19	340,669

U.S. Department of Treasury

Coronavirus Relief Fund COVID-19	239,446
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State of Wisconsin Department of Health and Human Services

Public Provider Relief Funding COVID-19	419,809
ACL Independent Living State Grants	20,393
ACL Assistive Technology	42,709

Social Security Administration

54,425

Wisconsin Public Service Commission

41,526

State of Wisconsin Department of Health Services

Center for Independent Living	38,601
AODA	106,228
Universal Service Fund	5,884
Title VII CH 1 Part B Independent Living Services	2,266

Personal Assistance Services Program

26,647,344

Foundations / Grants

178,935

United Way

75,539

Entrepreneurial Efforts

16,789

Program Service Fees

304,707

Fund Development

28,101

Rent Income

190,797

Net Investment Return

2,750,311

Other Revenue

25,717

Total Revenue

31,969,967

27.7 M EXPENSES

Salaries / Burdens	25,280,993
Operational	914,720
Contractual Services	385,357
General / Administrative Expenses	1,155,261
Total Expenses	27,736,331
Change in Net Assets	4,233,636
Net Assets, Beginning of the Year	24,344,150

28.6 M EXPENSES

Net Assets, End of Year

28,577,786

This consolidated statement includes Independence First, Inc. and Independence First Foundation, Inc.

2020 CONSUMER SUMMARY

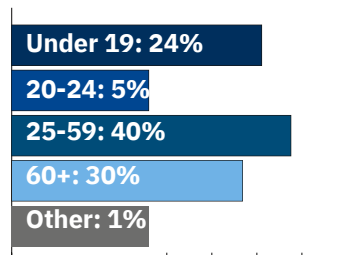
Total number of
people served in
2020

5,195

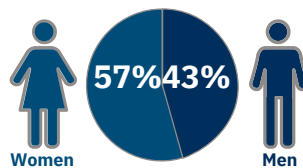
10,650

Additional individuals
impacted through staff
community activities

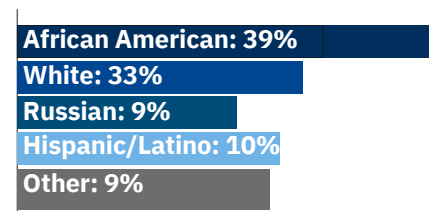
AGE OF CONSUMERS



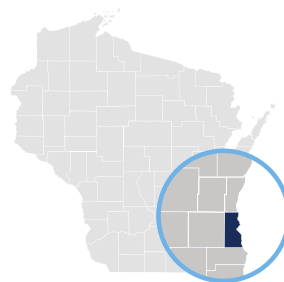
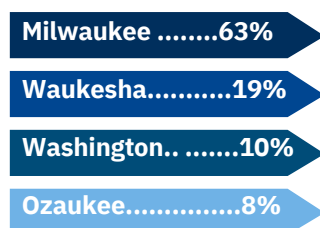
GENDER



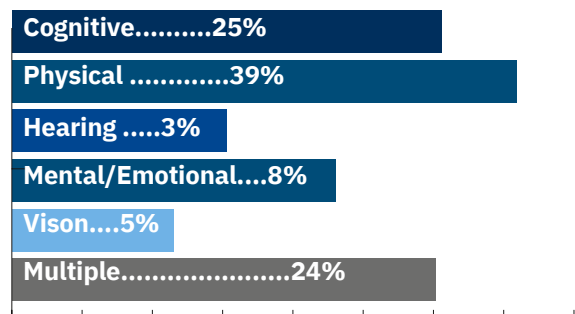
RACE AND ETHNICITY



PEOPLE SERVED BY COUNTY



DISABILITY OF PEOPLE SERVED



PROGRAM SERVICES IMPACT



944

Number of those
benefiting from the
Independent Living
Services Program



1,200

Individuals who receive
Personal Care Services in
their homes



2,310

Number of people
utilizing Information
and Referral Services



741

Individuals impacted through
Assistive Technology, Substance
Use Disorder Services, Rep.
Payee, Benefits Counseling
and WisLoan/Telework

MISSION STATEMENT

The mission of Independence First is to effectively facilitate empowerment of individuals with disabilities through the core services of Advocacy, Independent Living Skills, Information and Referral, Peer Support, and Transition.