



**Shangri-La**  
Enriching Lives Together



2018-2019

# ANNUAL REPORT



## A MESSAGE

### FROM CEO JANET YOUSEY

First, thank you for taking the time to review Shangri-La's annual report.

The 2018-2019 fiscal year was a year of both difficult decisions (see page 11) and exciting promise with the completion of Project Impact (see pages 7-10) and the continued growth of support by our community.

In looking back at the roller coaster that was this past year, my thoughts always come back to the individuals we have the privilege of supporting each day and the dedicated team of diverse people that power Shangri-La. It is in this spirit, that many pages in this annual report show the faces of the people that make Shangri-La great -- the faces that many of you

have likely supported through your contributions of time, talent, and treasure. Thank you.

As we look to the future, our strategic priorities for the 2019-2020 fiscal year are to:

- Implement Project Impact experiments/adjustments
- Continue to carefully monitor revenues and expenses to ensure financial sustainability
- Revitalize the organization's values and culture
- Increase the stability of person-centered supports by decreasing staff turnover

I look forward to partnering with you in the upcoming year as we continue to build inclusive communities.

- Janet

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## AT OUR CORE

*Mission: the reason we exist*

Serve individuals with disabilities or disadvantages so they may recognize and achieve their full potential.

*Vision: the change we hope to make*

Communities where all people are accepted for their abilities and celebrated for their successes.

*Values: how we do our work*

Trust. Personal focus. Choice. Effective communication. Continual growth.

1299

### PARENTS WITH BARRIERS TO SELF-SUFFICIENCY

- 1,299 parents received life and job skills training to overcome employment barriers.
- 375 parents obtained employment.
- 30 teen parents received support to obtain their high school diploma or GED.

484

### INDIVIDUALS WITH INTELLECTUAL OR DEVELOPMENTAL DISABILITIES

- 160 people received daily living supports in a Shangri-La group or personal home setting.
- 45 homeless individuals/families received housing assistance and case management.
- 71 individuals participated in a life enrichment day program.
- 133 adults with disabilities received employment path supports.
- 75 job seekers with disabilities received community employment supports.

195

### INDIVIDUALS WITH CHRONIC MENTAL ILLNESS

- 57 people received recovery supports at a Shangri-La residential treatment home.
- 98 individuals received recovery supports in their own home.
- 40 people received rental assistance and supports to obtain affordable housing.

252

### INDIVIDUALS WITH OUTPATIENT MENTAL HEALTH NEEDS

- 252 individuals received therapy, case management and skill-building supports.
- 145 individuals received medication management services.
- 4,806 instances of outpatient mental health supports were provided.

*Some individuals served by Shangri-La may receive supports through multiple programs and may be counted multiple times in these totals.*



## REVENUE SOURCES

In fiscal year 2018-2019, Shangri-La sustained monthly revenues at or above \$1.95 million.

78% | Program Revenue  
Service Revenues

21% | Other Revenue  
Rental Income/Subsidies, Commercial Revenue, etc.

1% | Donations  
Monetary, In-Kind, Grants, Investment Income

## OPERATIONAL EXPENSES

79% | Wages and Benefits  
On average, Shangri-La employs 500 people.

13% | Occupancy Expenses

7% | Administrative Supplies, Employee Training

1% | Repairs, Maintenance, Transportation



# 4 YEAR IN REVIEW

2018

07 | AUG



Seven Shangri-La homes hosted National Night Out neighborhood parties.

08 | SEPT



Shangri-La's Capital City Cornhole Classic fundraiser hosted 42 teams of all abilities and raised over \$8,000 to support Shangri-La programs.

19 | NOV



The 'Thankful for Friendly Faces' and 'Beyond the Plate' events, funded by Giving Tuesday donations, helped ward off feelings of loneliness and depression that can cause crisis for individuals with mental illness during the holidays.

17 | DEC



03 | MAY



The Siletz Tribal Charitable Contribution Fund gives \$2,348 in support of enhancing Shangri-La's Social Club.

17 | MAY



Better Together Luncheon attendees learn practical ways to build more inclusive communities and raise over \$14,000 to support Shangri-La.



25 | SEPT



The Willamette Valley Wedding Professionals raised \$715 to support Shangri-La's Accessible Egg Hunt.

08 | NOV



The Life Enrichment Activities Program launched the 'Shangri-La Rocks' painted rock community project in Newport.

25 | DEC

2019

20 | APRIL



The Holiday Wishes Project fulfilled 152 gift wishes for individuals served with no or limited income or family support.



Accessible Egg Hunt demonstrated how a community egg hunt can be more accessible and inclusive with minor modifications.

04 | JUNE



Individuals served and employees advocate for a wage increase for Direct Support Professionals during advocacy day at State Capitol.

26 | JUNE



Community wiffle ball game helps build understanding and acceptance among players of all abilities and ages.

*These funds/projects are 100% donor-funded.*

### Jan Kral Legacy Scholarship Fund

paid out

**\$2,877**

to provide

**93 individuals**

with educational, cultural or  
community access opportunities.

### Jan Kral GED Scholarship Fund

paid out

**\$3,588**

to provide

**22 parents**

with access to GED prep courses  
and to cover GED testing fees.

### Holiday Wishes Project

fulfilled

**\$2,100**

in holiday gift wishes for

**71 individuals**

who would have otherwise  
not received a holiday gift.

### Care Cabinet Project

provided

**292**

household essential items to

**190 family members**

in Shangri-La's Youth and  
Family Services Program

### Louise's Shoe Fund

paid out

**\$1,791**

to help

**33 individuals**

with medical, transportation or  
personal care assistance.

### Harms Home Repair Fund

paid out

**\$2,100**

to help complete  
home repair and  
maintenance projects.

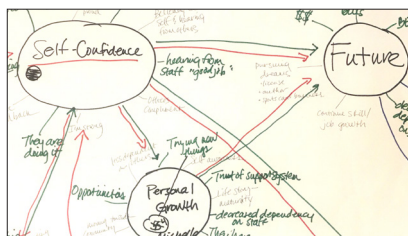
- **192 volunteers** contributed **1,403 hours of service** to enhance Shangri-La's mission.
- **5 donation drives** provided **over \$2,500 in in-kind household essentials and personal care items** to support Shangri-La's Care Cabinet Project.
- **124 supporters** made their first donation to Shangri-La.
- **18 new donors** joined the Better Together Monthly Giving Community.
- Shangri-La's Facebook page reached the **1.5K follower** milestone.



## About Project Impact

In February 2019, teams comprised of administrative and program leaders from across Shangri-La began the work of:

- clarifying the intended impacts of Shangri-La programs
- using data, not anecdotes, to evaluate the impact our services are having on individuals served
- identifying experiments and adjustments that could bring services closer to the desired outcomes



*Project Impact findings mapping activity*

With coaching from leaders at Dialogues in Action and after months of qualitative interviewing, quantitative surveying and data analysis, below are samples from our full impact reports.

## I/DD Housing Program

Provides daily living supports to adults with intellectual/developmental disabilities

Total in program: ~135

Interview sample: 40

Surveys completed: 111

### IMPACT FINDING: EVERY CHOICE YOU MAKE, MAKES YOU

The data showed that individuals in the program are exercising personal choice and taking calculated risks which aligns with the program's aim to empower individuals to make their own choices and direct their services.

### IMPROVE FINDING: DO WITH, NOT FOR ME

The data revealed that 'learned helplessness' can be an unintended outcome of supports thus creating reduced independence and skill deficits in program participants.

ADJUSTMENT: Provide training to Shangri-La's direct support professionals on how to provide functional skills coaching to aid in skill development; develop a culture of 'do with, not for'.





## Youth and Family Services

Provides life and career skills training to parents receiving Temporary Aid for Needy Families (TANF)

Total in program: ~350

Interview sample size: 26

Surveys completed: 26

### IMPACT FINDING: STOP. RE-THINK. TRY AGAIN.

The data revealed that YFS's focus on helping participants learn the skills needed to overcome adversity is creating high levels of resiliency in participants leading to quicker recovery from set-backs.

### IMPROVE FINDING: FAMILY - THE DRIVING FORCE

The data showed that the participant's family is the greatest driving force in motivating them to complete program goals.

ADJUSTMENT: Develop family-based strategies to increase participant buy-in and include family members in program activities.

“By setting goals and breaking them down into smaller, short-term ones, it has made it easier to focus. I can achieve things I didn't think I could.”

- Youth and Family Services Program Participant

## Employment Services Program

Helps adults with intellectual/developmental disabilities achieve employment goals

Total in program: ~85

Interview sample size: 30

Surveys completed: 49

### IMPACT FINDING: EVERY CHOICE YOU MAKE, MAKES YOU

The data revealed that when participants can practice skills in a safe setting that provides positive reinforcement they gain the confidence needed to try new tasks. They also report greater feelings of belonging and show more instances of self-advocacy and independence.

### IMPROVE FINDING: DO WITH, NOT FOR ME

The data revealed that many participants show a lack of interest in engaging with the community at large or making new friends outside of work. Many noted that the friends they have at work -- their peers and their staff -- are the only friends they need. This may suggest an unhealthy reliance on services.

ADJUSTMENT: Provide opportunities for participants to meet new people with similar interests; educate why this is important.



## Mental Health Housing Program

Provides daily living and recovery supports to adults with chronic and severe mental illness

Total in program: ~27

Interviews completed: 23

Surveys completed: 21

### IMPACT FINDING: SHOW ME. STEP BACK. WATCH ME GO!

The data revealed that many individuals in the program have a desire to and are seeking opportunities to do things on their own due to the safety net provided by Shangri-La.

### IMPROVE FINDING: MEETINGS FOR DREAMS

The data showed that participants want more conversations about future goals/aspirations and greater supports connecting them with community resources

ADJUSTMENT: Implement weekly 'dream meetings' with clients and ensure service planning includes goals that connect participants to resources.

## Rental Assistance Program

Provides rental assistance and case management to individuals with severe mental illness

Total in program: 30

Interviews completed: 29

Surveys completed: 23

### IMPACT FINDING: FROM NOPE TO HOPE.

The data revealed that participants are openly expressing more hope for their future and are more actively exploring possibilities for their future than they were before entering the program.

### IMPROVE FINDING: SENSE OF PURPOSE OR JUST SURVIVAL?

The data showed that despite being more hopeful, many participants, especially those who were previously homeless, still believe survival (meeting basic needs) is their sole purpose, and are thus not participating in long-term thinking.

ADJUSTMENT: Adjust supports to be equally focused on maintaining stability AND helping participants explore their passions and interests to develop a deeper sense of purpose.

"I do know that my mental issues are always going to be a barrier, but I am working on figuring out how to manage, so it doesn't hold me back more than it already has.

- Rental Assistance Program Participant



## Life Enrichment Activities Program

Provides community integration opportunities to adults with intellectual/developmental disabilities

Total in program: ~28

Interview sample size: 24

Surveys completed: 24

### IMPACT FINDING: ADVENTURE AWAITS

The data revealed that participants greatly value the 'adventure' opportunities the program offers as it allows them to explore interests, build relationships, and discover preferences in a safe setting. The data also showed that these opportunities create greater feelings of community inclusion.

### IMPROVE FINDING: SAY WHAT??

The data revealed that barriers to communication greatly affect some individuals' full participation in the program's activities and limits their ability to communicate likes and dislikes, as well as, make choices about activities thus resulting in less person-centered services.

ADJUSTMENT: Implement a communication assessment for each person in the program to identify the best methods and any tools needed to remove communication barriers.

## Outpatient Mental Health Clinic

Provides daily living and recovery supports to adults with chronic and severe mental illness

Total in program: ~133

Interviews completed: 16

Surveys completed: 28

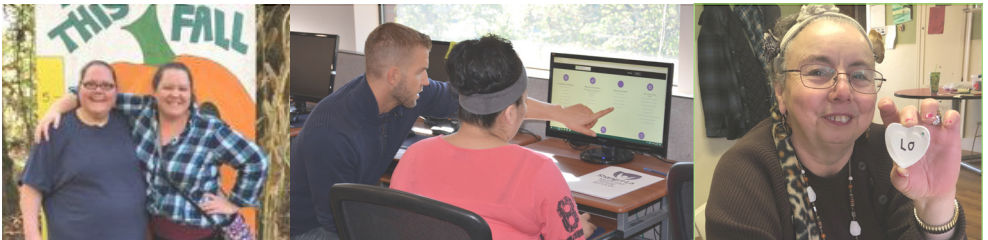
### IMPACT FINDING: BREAKING DOWN THE WALLS

The data revealed the majority of individuals expressed great distrust in the mental health system. Yet, since receiving services at Shangri-La, 77% of clients stated that their ability to trust systems has improved along with their confidence in being able to navigate these systems to get their needs met.

### IMPROVE FINDING: I MATTER!

The data showed that participants have a need for validation and that Shangri-La is providing that for them. However, the research team was unable to pin-point 'how' this validation is happening, thus not being able to make it intentional.

ADJUSTMENT: Continue research to identify how the clinic team is meeting clients' needs for validation so those behaviors can be further embedded.



In late 2017, Shangri-La started to experience a gradual financial downturn related to increased health insurance costs, unfunded wage increases, and reduced program revenues. After carefully analyzing program sustainability and implementing several cost-saving measures related to benefits, in early 2019, Shangri-La's executive leadership team decided program closures (as outlined below) were necessary to achieve long-term viability.

- **Closed Cherry City Woodshop, a sheltered workshop for individuals with disabilities.**  
Reason: Sheltered workshops are no longer a funded form of employment for people with disabilities.
- **Closed two Residential Treatment Homes (RTH) for individuals with mental illness in Newport and Albany.**  
Reason: Lack of referrals to fill vacant beds and inability to re-negotiate service contracts to bring rates in alignment with current costs.
- **Closed Independent Living Services (ILS) for individuals with mental illness in Benton, Lane, Lincoln and Marion counties.**  
Reason: Lack of referrals to meet the billable hours needed to be sustainable, as well as, service rates that were too low to cover even basic program costs.

During this period of downturn, Shangri-La operations were maintained, in part, by using funds in the organization's reserve fund. Financial reports thus far in fiscal year 2019-2020 show improved health.

The organization will continue to focus on long-term sustainability measures, as well as re-building the organization's reserve fund in the upcoming fiscal year.



## Board of Directors

***Shangri-La's Board of Directors enacts governance and financial management policies, as well as, ensures the organization has adequate resources to advance its mission.***



**Nick Bender**  
President  
*Project manager,  
Bonneville Power*



**Jan Frank**  
Vice president  
*Owner, West Salem  
Ace Hardware*



**Michael Kemry**  
Secretary  
*Realtor, Harcourts  
NW Oregon Realty  
Group*



**Dan Gilmour**  
*Owner, Gilmour  
Construction*



**Winifred Ju**  
*Clinical  
Psychologist*



**Jake French**  
*Motivational Speaker  
and Author*



**LeeAnne Gilmour**  
*Business  
Development Officer,  
Citizens Bank*

## Executive Director Team

***Shangri-La's Executive Director Team is responsible for the daily operations of the organization.***



**Janet  
Yousey**  
CEO



**Ron Perry**  
*Director of  
Finance*



**Holly Pharms**  
*Director  
of Human  
Resources*



**Ashley Erb**  
*Director of  
Community  
Engagement*



**Teri Marsh**  
*Director of Career  
& Life Enrichment  
Services*



**Robin Winkle**  
*Director of  
Clinical and  
Homeless  
Services*



**Nathan Mart**  
*Director of  
Mental Health  
Housing*



**Tiffani Olsen**  
*Director of  
I/DD Housing*



Join the  
Better Together  
Giving Community  
with a \$10  
monthly  
contribution.

The Better Together Giving Community understands that helping individuals with disabilities and families with disadvantages thrive at home, at work and in our community requires an on-going and consistent commitment to Shangri-La's mission and vision.

Your monthly contributions will help ensure Shangri-La has the resources needed to meet current needs, fill funding gaps, and ensure person-centered services.

Already a Better Together member?  
Consider increasing your monthly donation by \$5.



**Shangri-La**  
Enriching Lives Together

Name \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

*I am ready to be Better Together.*

I would like to make a monthly contribution of:

☐ \$10 ☐ \$25 ☐ \$50 ☐ Other: \_\_\_\_\_  
on the: ☐ 1st ☐ 15th ☐ 25th of each month.

*I am ready to be even Better Together.*

Please increase my monthly donation by:

☐ \$5 ☐ \$10 ☐ \$20

#### **PAYMENT DETAILS**

☐ Establish an **ACH transaction** using the voided check enclosed.

☐ Please charge my **credit/debit card**:

☐ Visa ☐ Master Card ☐ Discover

Name on card: \_\_\_\_\_

Card # \_\_\_\_\_

Expiration Date: \_\_\_\_ / \_\_\_\_

Signature: \_\_\_\_\_

*Signature authorizes Shangri-La to process the monthly donation until donor notifies Shangri-La of discontinuation.*

Mail to: Shangri-La, Attn: CET, 4080 Reed Road SE #150, Salem, Oregon 97302. You can also sign-up online at: [www.shangrilaoregon.org](http://www.shangrilaoregon.org).



# Shangri-La

Enriching Lives Together

Founded in 1963, Shangri-La is a 501c3 nonprofit human services organization dedicated to serving individuals with disabilities and families with disadvantages so they may recognize and achieve their full potential.

Services are provided in Marion, Polk, Yamhill, Linn, Lane and Lincoln Counties.  
Shangri-La employs approximately 500 people.

*Give. Activate. Join.*

We truly are better together. Connect with us to learn how you can support current needs or invest in building an inclusive future for people of all abilities.

## GIVE ONLINE

[www.ShangriLaOregon.org](http://www.ShangriLaOregon.org)  
*Join the Better Together Monthly Giving Community with a monthly gift of just \$10.*

## GIVE BY MAIL

Shangri-La  
Attn: CET  
4080 Reed Road SE #150  
Salem, Oregon 97302

## CONNECT

Phone: 503-581-1732  
Email: [community@shangrila-or.org](mailto:community@shangrila-or.org)  
Facebook: @ShangrilaCorp  
Instagram: @ShangrilaOregon

## JOIN THE TEAM

*Shangri-La is a place for bright minds, kind hearts, learners and leaders.*  
View current career opportunities at:  
[www.shangrilaoregon.org/Home/Jobs/](http://www.shangrilaoregon.org/Home/Jobs/)