



# WAKE ENTERPRISES, INC ANNUAL REPORT

## FY 2013-2014

*Mission: To assist people with disabilities to achieve their maximum level of independence.*

## To the WE Community

I am going to be frank; this has been a tough year for Wake Enterprises. Funding has decreased, and we have seen a decline in production and special events revenue. However, you will find the events we have to celebrate and the accomplishments we have achieved to help enhance the lives of the people we serve in this report.

### FINANCIAL HIGHLIGHTS

We received our first donation from PNC Bank through our first Open House Festival. In addition, we received another WE WORK grant from the Duke Energy Foundation to put towards our coffee “city cup” machine. Mother Nature affected us this year, forcing us to close eight and a half days, resulting in loss revenue of approximately \$66,000. In addition, changes in billing to the local managed care organization have caused us to lose almost \$7,000.

### OPERATING HIGHLIGHTS

As I have often said, Wake Enterprises is a well kept secret. This year we gave the community many opportunities to come to us and learn about our services. We opened our doors to anyone who wanted to come in and meet the participants who work just as hard as you and I do each day. Between our special events, horticulture and art programs; we have introduced a new world to our participants, and in many cases, a new world to those who have never heard of Wake Enterprises or met a person with a disability.

### LOOKING AHEAD

Due to the financial impact this year, we have to recover. We are now venturing into new territories - a bottling operation and a coffee packaging operation. We want Wake Enterprises to remain the organization that has been around for 35 years delivering impeccable, quality services to adults with intellectual and developmental disabilities. This means we have to adapt to the changing community around us and rise up to meet those demands. We have to grow, even if that means not looking like the same organization. We will always uphold the same values that have laid the ground work for our agency, but we may look different in the future. We cannot predict forces of nature, but we can be prepared to overcome any setbacks we may encounter. I hope you are in this with us because we need our WE family to rally and support Wake Enterprises and our participants.

Sincerely,

*John McClain*

President, Board of Directors

# 2013-2014 Initiatives

## OPEN HOUSE FESTIVAL



**WE GIVE Sponsor PNC BANK**

We held our first Open House Festival this past May. It was a beautiful day for the event with over 200 people in the attendance. The day included an Ice Cream Social, WE CREATE Art Showcase featuring our participants' art work. In addition, our WE GROW Horticulture Program was on display. Herbs, flowers and plants grown by the people we serve were given away for contributions. In collaboration with our WE CREATE Art Program, the Horticulture participants grew bird house gourds and the Art participants painted them and sold them at the festival. They



**Plants on display at Open House**

were a huge hit and went quickly. Our WE Singers provided the musical entertainment throughout the event and the winners of

the Women's Club Art Show were given their prizes. We also held a silent auction, giving everyone an opportunity to bid on trips, basketballs, and other fun prizes. Our cornhole boards were on the grounds and many participated in tossing the bean bags.

We raised \$12,000 to support the services of Wake Enterprises on this day. A special thank you to our leading sponsor: Jones Insurance Agency. Our WE WORK Sponsors: Bob and Susan Daly, Don & Kathy Hutchinson, Chris & Susan Lemmons, Walter & Kathy Weeks. Our WE GIVE Sponsors: Wyatt & Judy Buckingham, Maureen Scott, PNC Bank, Nick and Barbara Wagner, and John and Frances McClain.

**Waiting for Ice Cream!**



PNC was our newest sponsor. PNC also got to know WE participants by visiting and teaching at our Air Park facility. A PNC representative trained our participants on banking. The information was well received by our participants and one of the primary topics of conversation the days following the training. It was very helpful for them to gain a basic understanding of banking, as all of the individuals in attendance work and thus earn their own income. Being more knowledgeable about banking operations will enable them to be more participatory in managing their own financial resources.



**Performance by Burning Coal Theatre**

**BRINGING ART TO WE**

Through a partnership between WE and the City of Raleigh Arts Commission, we have been able to bring in local artists to teach our participants varying art forms including visual, theatre, and music. In continuing our theme of bringing the community to WE and our participants, we brought in The Burning Coal Theatre to perform their version of *The Tempest* by William Shakespeare. This production took place on the workfloor of our Raleigh facility. The high energy cast played more than 20 roles in the production. The show was lively, funny, and held the

attention of everyone in the room.

Our participants were engaged the entire time. We are so thankful to the City of Raleigh Arts Commission for this grant and the opportunities that it affords our participants.

Our Aktion Club invited Officer Pickens to one of their meetings. He brought in his dog from the K-9 unit to talk about how dogs locate evidence. The participants really enjoyed this interactive presentation.



**Officer Pickens and Participants**

**INCREASED TRAINING TO EMPLOYEES**

During one of our staff training days, we brought in a trainer from The Developmental Disabilities Training Institute to instruct a large part of our employees in Personal Outcome Measures (POMs). The Personal Outcome Measures focus on the issues that matter most to the people we serve and is a life tool that we use in the

programming for our participants. POMS assist our employees in learning about people’s personal definition of quality of life and preferences in order to support their goals. So far, we have completed 120 POMs and are reviewing results for planning purposes. POM results indicate we are strong in safety and protection from abuse, neglect and exploitation. Participants would like more choice in terms of where they live, but WE has limited control over that.



**Staff during tennis training**

To aid our employees in serving their participants, we brought in a certified tennis instructor. We purchased rackets, balls, and additional tennis equipment that our staff can use in teaching our participants basic tennis skills. The instructor gave practical, useful tools to aid in teaching our

participants. It was a fun time for all those involved, and they learned something they can incorporate into their daily routines with their participants.

**WE WORK: BOTTLING AND COFFEE OPERATIONS**

Our Participants have told us they would like more diverse work opportunities in our facilities. In addition, Wake Enterprises has experienced some decline in Production work due to long standing contracts being moved out of the United States. Wake



**Participant and Staff working on the line**

Enterprises wanted to meet the interests of our Participants, as well as create new work opportunities that have potential for revenue growth.

Automation is on the increase and Wake Enterprises made the determination we should purchase a commercial bottling operation and market our own products. A \$25,000 grant from the Duke Energy Foundation allowed us

to leverage funds to purchase commercial bottling equipment, as we as secure a wholesale customer. So far,

eight different individuals have been trained on various jobs relating to the bottling operation. We bottle only green, non-caustic products, including commercial cleaning materials, hand and body wash, and car wash. Revenue generated to date has not been significant, but it has generated additional revenue and provided additional wages to the Participants who work on the operation. We are looking for increased opportunities to market and expand this growing business.

We are also very excited about our upcoming coffee venture. Wake Enterprises was awarded a \$7,000 grant from the Duke Energy Foundation for our Single Serve Cup Coffee Initiative.

Oak City Coffee is teaming up with Wake Enterprises to purchase equipment, create a new product, and provide permanent meaningful work to the people we serve. The purpose of the project is to create a highly marketable product that can be manufactured by persons with disabilities. The product itself is the single serve coffee pod, compatible with single serve coffee makers that we are calling City Cups. The machine has been purchased and our building is being outfitted for a coffee clean room. We cannot wait to manufacture this delicious coffee.



**Participant working on the Bottling**





**HONORING OUR SUPPORTERS**

The nOg Run Club has been a supporter of WE the past few years by way of their Charity Night and The Oktoberfest 8k Run. Their support has been invaluable. They have not only been strong funders, but they have

increased our circle of friends and opened up an entire new network of people to Wake Enterprises. The all volunteer board of the organization has created a culture of philanthropy within their organization. They pride themselves on giving back to their running community, in the form of exercise, social opportunities, and philanthropic opportunities. WE nominated the Run Club for the 2013 National Philanthropy Day for the Innovation in



**Kim Bates, Jason Bone, Wanda Rush at the Run**

Philanthropy Award and they won. We are so happy for them and value the support they give to Wake Enterprises and the many other nonprofits they help.



**Henry Casey manning our booth**

Robert Daly and The Daly Charitable

Trust have been donors of Wake Enterprises (WE) for many years. Robert's, known as Bob, brother in law attends WE, and his wife Susan is on our Board of Directors. The Trust has given \$54,000 to WE.

Bob gives through this family's Trust and through the Knights of Columbus. Bob and his wife were the driving force in getting the Bill Scott Endowment started as a way to support the Knights of Columbus LAMB Foundation. They provided the seed money to get this program started and continue to be an active oversight in the endowment operation.

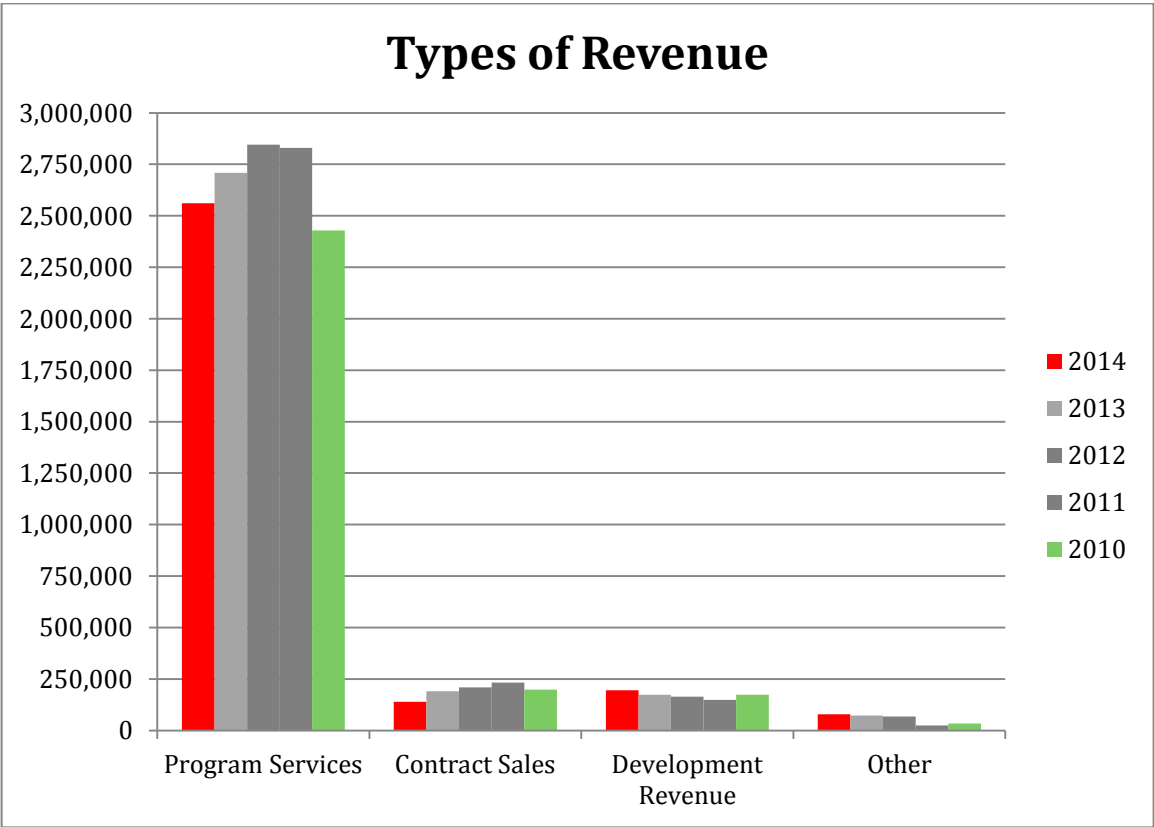


**Susan & Bob Daly, Maureen Scott, Walter Weeks**

Bob is a participant in our Annual Golf Tournament and also sits on various boards, including Passage Home, as their family has a heart and passion for serving those in need. His company, Daly Seven, also serves as the official hotel provider for the Capital Area Soccer League. As a Knight of Columbus, Bob supports numerous nonprofits and special education classrooms serving people with developmental disabilities. Over the past five years alone, the Knights have given WE \$16,000 to serve people with disabilities. We nominated him for the 2014 North Carolina Rehabilitation Facilities Advocacy Award and he won. Bob, his wife Susan, and mother in law Maureen were present when he was awarded the honor.

# Revenue

Because of the changes in state funding and merger of the managed care organizations and the impact of our closing because of bad weather, we saw a decrease in program services revenue.



For a copy of our 990, go to [www.guidestar.com](http://www.guidestar.com) or our website. To request a copy of our audit, call 919.714.6100.

# 2013 – 2014 Sponsors

## 2013 Golf Tournament Sponsors

### Platinum Sponsors

Burton Signworks

### Gold Sponsors

Aaron & Jane White and Bill & Susan White

Brock Maintenance Services

Food Express

Laser Recharge of the Carolinas

Sears Contract

Walter & Kathy Weeks, Kathy & Don Hutchinson, and Susan & Chris Lemmons

Bob and Susan Daly

First Citizens Bank

Jones Insurance Company

Legacy Wealth Strategies

Wyatt and Judy Buckingham

### Silver Sponsors

Acudata

Cardinal Travel Service

Grill Works

Maureen Scott

BB&T

Carolina Vending

Kennedy Office

### Bronze Sponsors

Hal and Laura Averette

Norman & Betty Camp

Moore's Storage Buildings

Wayne and Gayla Gentry

## Open House Festival Sponsors

### WE BELIEVE:

Jones Insurance Agency

### WE WORK:

Bob and Susan Daly

Don & Kathy Hutchinson, Chris & Susan Lemmons, Walter & Kathy Weeks

### WE GIVE:

Wyatt & Judy Buckingham

PNC Bank

John and Frances McClain

Maureen Scott

Nick and Barbara Wagner

## 2013-2014 Grants

City of Raleigh (Community Services & Arts Commission)

Duke Energy Foundation

Holy Trinity Evangelical Lutheran

United Way of the Greater Triangle

Daly Charitable Trust

North Carolina Department of Transportation

Knights of Columbus



Wake Enterprises, Inc. is a private, nonprofit organization committed to the vocational and social development of people with developmental disabilities. WE offers vocational and community-based services, supported employment, subcontracting services for local businesses, and volunteer opportunities.

**Mission Statement:** To assist people with disabilities to achieve their maximum level of independence.

**Statement of Values:** Wake Enterprises recognizes the value of each individual's contribution to his/her community.

**Vision Statement:** To assist our customers to achieve a higher level of success.

## LOCATIONS

Miller Building: 3548 Bush Street Raleigh, NC 27609

Southern Wake Location: 3333 Air Park Road Fuquay-Varina, NC 27526

919.714.6100

[www.wake-enterprises.org](http://www.wake-enterprises.org)

## WE ACHIEVE OUR MISSION THROUGH A VARIETY OF SERVICES

**ENABLE (Employment Network for Adults Challenged by Birth and Life Events):** The umbrella term used to describe the components ADVP and Supported Employment.

**ADVP (Adult Developmental Vocational Program):** Focuses on teaching work skills and appropriate interaction in the workplace. Social and independent living skills are a secondary focus. Participants earn a paycheck while simultaneously learning necessary skills to be employed.

**Supported Employment:** Participants work with an Employment Specialist to attain and maintain jobs and work for pay in an integrated setting. We provide support and training; the people we serve provide the hard work and dependability.

**ICF (Intermediate Care Facility) Day Services:** This funding source is similar to ADVP; however, staff/participant ratios are smaller due to the intensity of participant needs.

**Modules:** Training Modules are set up to provide a variety of options that create a stimulating environment for people served and is driven by the individual's person-centered plan.

**Compensatory Education:** Through a partnership with Wake Technical Community College, participants receive daily classes.

**Innovations:** This Medicaid waiver provides one-to-one or small group services to people with more intensive needs.

**Job Enclaves:** These mobile crews take the people we serve out of Wake Enterprises facilities and into the work place.

# Leadership

## BOARD OF DIRECTORS

John McClain, President

Lorrie Hargreaves, 2nd Vice President

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Walter Weeks, Executive Director

Dixie Blackmon

Betty Camp

Susan Daly

Deborah Holt Noel

Mary Nell Ward

Aaron White, 1st Vice President

Wayne Gentry, Secretary

Kim Burchell, Treasurer

Wyatt Buckingham

Norman Camp

Rich Greb

Katie Rogers

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Rodney Gaddy, Duke Energy

Jerry Jones, Jones Insurance Agency

Brenda Locker Harris, First Citizens Insurance Services

Ed Wills, McDonalds

Bobbie Callahan, DE-STA-CO

Wayne Gentry, Retired Banker

Bill McWilliams, Consultant

## ADMINISTRATIVE TEAM

Henry Casey, Production and Procurement Director

Susan Lemmons, Finance Director

Kathy Hutchinson, Program Services Director

Oshana Watkins, Development Director

