



THE JOURNEY IS LONG,
THE WAY IS ROUGH,
WE WILL NOT FALTER.

MONARCH
ANNUAL REPORT
2008-09

BOARD CHAIR



Angela Barbee

Dear Family and Friends,

It has been a privilege to serve as board chair for 2009. This has been a challenging year for staff and board members. We have seen many changes with our current economic times and state cut backs but we have remained focused on the care of the people we support.

I am particularly proud of several changes that have taken place in 2009.

- The board has expanded our presence outside Stanly County.
- We held our first annual "Dreams Take Flight" golf tournament.
- Our marketing efforts have included an "e-newsletter" and a "viral video" getting our word out to the families and friends of Monarch.

These changes and many others have taken place while we continue to remain a leader in our field.

With 2009 being our first year as "Monarch" we have continued with the same values as always. We commit to serve, with *dignity* and *respect*, each person we support so that everyone we affect has the opportunity to make their "Dreams Take Flight!"

Sincerely,

Angela Barbee
Board Chair, Monarch

Monarch Board of Directors 2009

Angela Barbee

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“Adopting a home is the perfect way to share yourself and your spirit with appreciative friends in need. It doesn’t take a lot of time or money. But it does bring a lot of smiles and happiness to others.”

—Melinda Rummage

Adopt A Home Program Creates Lasting Bonds

The staff at Monarch works everyday to find ways to reach out and create networks within our communities for the people we support. When our staff made their Christmas wishes, one wish was repeated over and over. “I wish for the people we support to have a true place in their community. To be respected. To make friends. To be able to go out into town without people staring, or moving away from our table at a restaurant.” As a staff member so well relayed, “We’re more alike than different.” This request sparked an idea that would bring people together, provide activity and entertainment, create service opportunities for groups and most importantly, build friendships and memories.

The Monarch “Adopt a Home” Program was a plan to allow local groups, organizations or companies to adopt a group home and its’ residents. The plan needed to be simple and effective – maybe a few dinners or parties over the course of a year - opportunities for the folks to mix with their new friends. The Arc of Stanly Committee willingly agreed to take this on as a pilot program in order to work through it and establish parameters. They adopted Valleyview with six residents in their 30s to 50s.

They started with a simple dinner at the Valleyview home. The instant chemistry among the group led to lots of laughs and an enjoyable time for all. The group anxiously planned their next event. After several more successful meetings, an Arc of Stanly Committee member invited fellow members and the Valleyview group to her Tillery lake home for a ride on her pontoon boat and an ice cream party. She sent special invitations to everyone, took lots of pictures, and sent notes with pictures to the residents afterwards. The house members were elated!

The bonds and friendships grew stronger. The Arc of Stanly Committee and their new friends at Valleyview looked forward to their times together and often “outdid” each other with special plans and treats for one another. Individuals connected and shared stories, likes and dislikes, sent birthday cards and even worried about one another when they were not feeling well. The year ended with a wonderful Christmas celebration for all.

The Valleyview program did not just benefit the house members. It provided an opportunity for people in our community to learn for themselves about the people at Monarch. In their final meeting of the year, Arc of Stanly Committee members expressed how priceless this experience has been and how it has changed their life. Thanks to their success, this program will soon be offered to willing organizations and groups throughout the state of North Carolina.

CEO



Dr. Peggy S. Terhune, PhD

"The one who is aware, is responsible."

This motto drives my life. I see injustice in so many places as people come to Monarch. The child who is abused and cannot speak for herself. The lady who has lived in a group home for 16 years, and now is told by the LME that she must "move out" because she only has mild mental retardation, and the LME will no longer fund her. The hard working man who wants and needs a job so desperately, but is continually turned away because many years ago, as an addict, he committed a crime. The devoted staff member who comes to us from an organization that took away all time off and health insurance, because the company just couldn't stay afloat otherwise. The man who will no longer receive mental health services because the state budget is in trouble, and he fears without his services and medications that he will hurt someone because the voices in his head will come back.

My heart aches for these people, yet I am so grateful for all of you, who are aware and responsible. Because of you and your support, Monarch can help each and every situation that arises. Because of you, injustice ends with Monarch.

We have to face the facts. Life is really hard for so many people right now. Our challenge has been to make the money stretch farther, to encourage staff to be more creative in finding solutions, and to continue to be stable and strong. And thanks to our supporters, Monarch has been able to do just that.

In the past year, we have had to make many changes, but we are stronger than ever. We are aware of the need and the state's deficit. We know what we are facing. We know that the people we support need us now more than ever.

We are here. We are strong. We will survive. We are aware of the problems, and we are responsible for solving them. As we have done in the past, we will do in the future. Help people dream. And help them reach the dream.

Your continued support brings dreams to life. Thank you for your donations, your time, and your faith in what we do.

A handwritten signature in cursive script that reads "Peggy S. Terhune". The signature is written in black ink on a light-colored background.

Dr. Peggy S. Terhune, PhD
CEO, Monarch

CQL Awards National Accreditation to Monarch

The Council on Quality and Leadership (CQL) spends countless hours reviewing and researching organizations in the human services field to determine eligibility for national accreditation. Once accreditation is achieved, the CQL continues to closely monitor operations each year to ensure that expectations are met or exceeded for an organization to maintain their national mark of excellence.



is an international accrediting body with a long history of advocacy and setting the standard for quality in the human services field.

For more information about CQL, go to www.thecouncil.org.

During the summer of 2008, CQL presented Monarch with national accreditation as a result of its initial review process. They researched Monarch's programs, policies, people, and most importantly the way staff works with the people we support on an individual basis. One of the most important factors in determining accreditation is whether or not Monarch identifies the needs and dreams of each person and helps them work towards their goals – the very line which defines the mission of Monarch as an organization.

The results of the first CQL report reveal exceptional scores in all areas. Individuals and their families supported by Monarch shared stories of personal triumph and positive experiences. Volunteers and staff relayed their passion for the people they support and their love for what they do. We look forward to sharing more good news as CQL continues to evaluate Monarch in the coming years.

Monarch would like to extend our most sincere thanks to the individuals who spent time with the CQL representatives and helped us to achieve the highest rank in the industry. We couldn't do it without you!

THE JOURNEY

Each year is much like a journey. A trip into the unknown with vast expanses of new territory to cover. The journey presents us with exciting challenges, many opportunities, and new wisdom. It is these challenges that make us braver, stronger, and more dedicated than ever to facing each year with a renewed passion for life and the pursuit of dreams. At the end of our travels, we look back and reflect on what has come to pass, where we stand today, and what lies ahead. For Monarch, 2008-2009 was a journey to remember.



We began the journey with a new name and image which fully portrays our organization and the people we support. This new identity represented a way to unite all of us across the state under one organization with a shared mission and vision. Our new image provided opportunities to connect Monarch with public personalities such as Mike Minter, Sara McLachlan, and Jimmie Johnson all of whom supported us in our efforts. We hosted our first golf tournament fundraiser with the help of Mike Minter and his team. We launched our first Public Service Announcements on television with the help of the Plain White Ts. And, our fearless leader, Dr. Peggy Terhune found another venue for advocacy through her televised talk show *Life Matters at Monarch*. Under one name, news of Monarch spread across the state and people began to ask for us by name requesting our services over others.

In July of 2008, we opened Southgate, a home dedicated to supporting people with severe and persistent mental illness who are currently hospitalized at long term psychiatric centers. Southgate is the first home of its type in the PBH catchment area (covering Stanly, Union, Cabarrus, Rowan, and Davidson Counties). Soon after, we opened a new community-based day activity program in Pitt County providing a much needed environment for folks to grow and learn in their local areas. Our efforts in working with the people we support and their families and helping them achieve their dreams led the Council on Quality and Leadership (CQL) to award Monarch national accreditation. The 2008 -2009 journey was off to an incredible start.

October 2008 brought gray skies as the State of North Carolina made budget cuts which deeply affected our cause. Extreme caution in the form of careful management of the budget was vital to moving forward and continuing to provide exemplary care for the people we support. Monarch leaders spent countless hours determining a course of action that would allow us to continue to thrive amidst a troubled economy. Our incredible staff showed their expertise, their commitment to the people we support, and their relentless drive to help dreams take flight by literally functioning with less and taking on more. While budgets were being cut, the need for services was growing. In the face of budget reduction came growth in the form of more than 100 new people supported by Monarch across North Carolina in 2008-2009. As a result of very careful planning and restructuring, by January 2009, we found a way to reduce expenses by over \$1 million, and to continue to provide the exceptional service people have come to expect from Monarch.

While numbers and statistics make up what we all know to be a typical annual report, Monarch is anything but typical. We wouldn't be true to ourselves or the people we support if we did not share the story about a journey of one of our own.

When "Leslie" came to Monarch in June of '09, she was hospitalized, self destructive, had been cut off from her family at their insistence, was unemployed, and had little will to continue her journey. Over the course of the year, she worked closely with her counselors in every area from job training to personal relationships to managing her depression. Through many forms of therapy, she found herself and was able to reconnect with her family. She received job training and found fulfilling work as a paid child caregiver. She is in recovery and enjoys time with her grandchildren and planning get togethers with her family.

Leslie is the reason we move forward when adversity stands in our way. She is the reason we believe in hope and a future filled with opportunity. We close the 2008-2009 chapter in the story of our journey with thanks for all we have learned, what we have gained, the fact that we remain true to our path in these tough times, and with a positive vision of what lies ahead. To our supporters, thank you for your continued efforts on behalf of those we support. Without your advocacy and donations, we would not have endured this journey so well. Monarch will continue to provide North Carolina the very best we have to give as we continue on into the next year.

FINANCIALS

Statement of Operations Net Assets

Year Ended June 30, 2009

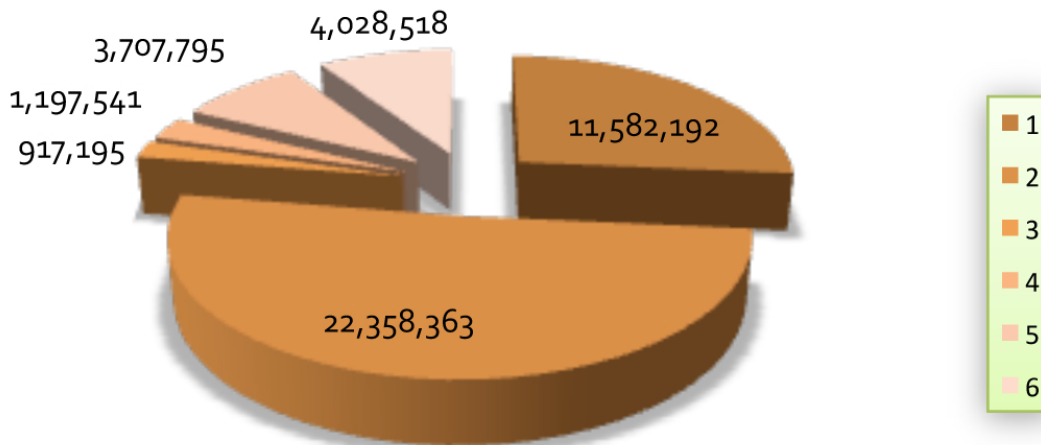
REVENUE

1 State & Federal Funding	11,582,192
2 Medicaid Revenue	22,358,363
3 County & Local Funding	917,195
4 Grants/Fundraising/Other Revenue	1,197,541
5 Rent & Fees for Services	3,707,795
6 Insurance Premiums	4,028,518

TOTAL REVENUE

43,791,604

REVENUE



Statement of Operations Net Assets

Year Ended June 30, 2009

EXPENSE

1 Personnel Services	30,079,517
2 Supplies & Materials	1,833,173
3 Current Obligations	2,541,546
4 Fixed Charges & Other Expense	3,203,357
5 Contract Services & Other	1,840,203
6 Insurance - Medical Claims	4,008,598

TOTAL EXPENSE

43,506,394

BEGINNING NET ASSETS

5,593,054

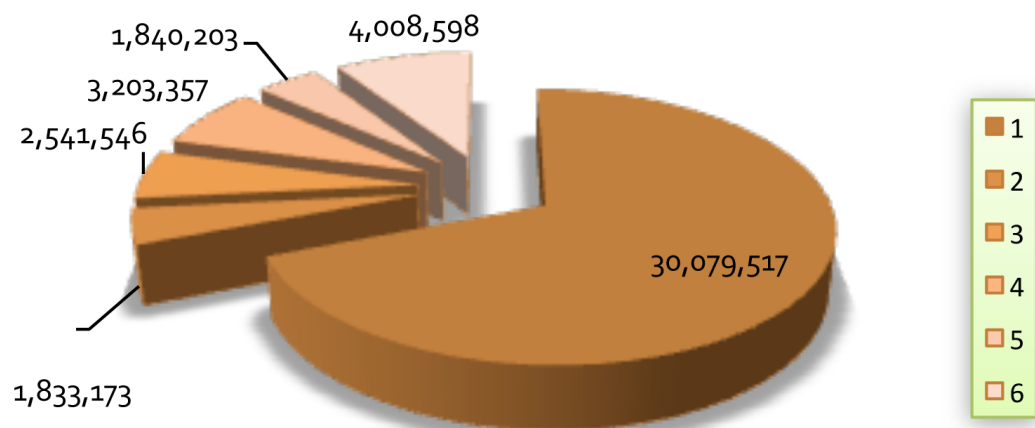
NET SURPLUS / (DEFICIT)

285,210

ENDING NET ASSETS

5,878,264

EXPENSES



FINANCIALS

Statements of Financial Position		
Year Ended June 30, 2009		
ASSETS		
Current Assets		
Cash and Cash Equivalents		1,794,486
Residents' Cash		245,505
Accounts Receivable, Net of Allowance for Doubtful Accounts		3,296,778
Inventory		7,608
Prepaid Expense		165,185
Total Current Assets		5,509,562
Property and Equipment		
Land and Land Improvements		157,904
Buildings and Improvements		3,402,174
Equipment		1,500,813
Furniture & Fixtures		201,836
Vehicles		1,830,403
Less Accumulated Depreciation		(4,059,406)
Net Property and Equipment		3,033,724
Investments		859,616
TOTAL ASSETS		9,402,902
LIABILITIES AND NET ASSETS		
Current Liabilities		
Current Installments of Long-Term debt		246,471
Accounts Payable and Accrued Expenses		2,256,809
Residents' Cash Liability		245,505
Deferred Revenue		3,946
Total Current Liabilities		2,752,731
Long-Term Debt		771,907
Total Liabilities		3,524,638
Net Assets		
Unrestricted		5,682,397
Temporarily Restricted		195,867
Total Net Assets		5,878,264
TOTAL LIABILITIES AND NET ASSETS		9,402,902

THANK YOU

to our donors 2008-2009

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Hopeless Case = **Hopeful Future**

A Journey Interrupted

Drug and alcohol abuse. Kicked out of school. In trouble with the law. You've heard the story before. A kid on a journey to nowhere. A lost cause. Bad news.

Where some people see a hopeless case, Monarch sees a hopeful future. One of our favorite success stories is about the person described above – Jamie. His journey wasn't easy, short, or painless. He had no interest in receiving help from anyone. But, his Monarch counselor and his grandparents knew that Jamie was meant for more. His counselor never gave up. Countless calls, meetings, and follow up amidst even more problems finally led to a breaking point when Jamie acknowledged the unfortunate situation he found himself in. And, he asked for help.

With the unwavering support of Monarch, Jamie managed to get control of his life and get back on track. Today, his journey has led him to the honor roll at school, a new group of supportive friends, sports, and writing. Jamie has gone from being a bad example to a role model in his community. His dream of a future filled with hope and opportunity is within reach.

So, the next time you hear about a kid who is in trouble or headed that way, think of Jamie. No one deserves to be a lost cause. Everyone deserves the chance to change direction, take the high road, and pursue their dreams.

Monarch is here to help.

www.MonarchNC.org





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