

FY
23



incompass
HUMAN SERVICES

Annual Report



Affiliate Chapter



Founding Affiliate

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LEADERSHIP

Leadership Team

Jean M. Phelps, Chief Executive Officer

Kelly Trickett, Chief Operating Officer

Adam Shuster, Chief Financial Officer

Rebecca Rausa, Chief Human Resources Officer

Daniel Esdale, Chief Marketing Officer

Michael Bloom, Chief Strategy and Innovation Officer

Emily Horn, Director of Day Services

Angela Otieno, Director of Residential Services

Heather Mantell, Director of Family and Community Services

Board of Directors

Timothy J. Allen, Chair

Brad MacDougall, Vice Chair

Tom Rogers, Treasurer

Steven D. Geoffroy, Clerk

Robert Anctil

Steve Hertog

Marybeth R. Massimino, CPA

Jonathan Seward

Emily Young

FROM JEAN

Dear Incompass Community,

It is with great pleasure that I share the FY 2023 Annual Report for Incompass Human Services, a year marked by exceptional achievements, growth, and, as always, an unwavering dedication to our mission. This was a significant year for our agency, as it marked the end of our three-year strategic plan. In the coming year, we will share our new strategic plan that charts a bold new future for the next five years.



As we look back on the past year, it's impossible to overstate just how proud I am of the Care Champions who have propelled Incompass Human Services to take major steps forward in our mission to empower the lives of people we serve. We have always been driven by a passionate commitment to providing the highest quality of care and support to those who rely on us, and one thing I most admire about our culture is our ability to meet the challenges of our time with resilience, creativity, and a profound sense of purpose.

We can continue to evolve our program offerings to meet the needs of the people we serve. We opened our first medically complex respite home, which will attract individuals from across the state. We grew our newly-dubbed Safe Minds Community Center and opened our second group home for residents with acquired brain injuries. We recruited 15 new Shared Living Provider families which has expanded the reach of that critical program. And we brought on The Arc of Opportunity as an affiliate, an agreement that enables us both to expand programs in our region and collaborate on critical initiatives including staff training, procurement, and technology.

Day Programs have continued to flourish, as our day hab return-to-program initiative has brought us back to capacity at Omni Way. Our active involvement with local trade and business organizations has deepened our roots in the community, and with loosening of pandemic restrictions we were able to resume some of our most cherished community-based programs and activities..

Incompass is deeply committed to our dedicated team members, and we actively support their growth. The promotion of 19 Care Champions, the addition of nearly 150 new staff members, and an impressive staff satisfaction score of 8 out of 10 are just a few of the milestones we've achieved. I am proud to see our team members recognized for their outstanding contributions, with Kelly Trickett, Michael Bloom, Nora Rwatangabo, and Claude Dossa all receiving well-deserved industry honors.

As you turn the pages of the annual report, I encourage you to reflect on the profound impact of our collective efforts. Each achievement, no matter how big or small, contributes to the realization of our mission. It is a testament to the dedication of our staff, the support of our donors, and the resilience of the individuals and families we serve.

Thank you for your continued support, your belief in our mission, and your dedication to making a difference. Together, we will continue to inspire and transform lives.

With gratitude,

A handwritten signature in black ink that reads "Jean Phelps". The signature is fluid and cursive, with a long, sweeping underline.

Jean Phelps, CEO

To the Incompass Human Services Community,

As we reflect on the year gone by, the themes of growth and commitment showcased in Jean's message resonate profoundly. It is with immense pride that I, on behalf of the Board, express our appreciation for the tireless dedication of the Incompass Care Champions.

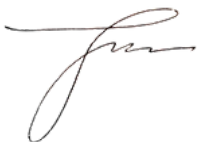
Our journey through the conclusion of the three-year strategic plan has not only been one of achievement, but also a testament to the vision of Incompass Human Services. The affiliation with New England Human Services Collaborative (NEHSCO) marked a new horizon, promising enhanced collaboration and further growth, and with The Arc of Opportunity we are closer than ever to building this person-focused network.

The successes of Incompass have always stemmed from our core belief that everyone has a purpose and place in this world. Our expansion in residential services, the milestones achieved in our Day Programs, and the impact of our Community Engagement initiatives have all been driven by our commitment to help the people we serve find it. These are not mere achievements on paper; they reflect real stories of lives impacted and communities transformed. They epitomize what Incompass stands for: empowerment, inclusion, and unwavering care.

The profound sense of purpose highlighted by Jean and the entire Incompass team is truly palpable. This organization is not just about growth in numbers, but about growth in spirit, resilience, and community. Our focus on administrative excellence and the empowering culture fostered by every Care Champion demonstrates our commitment to nurturing and uplifting our community – the open hearts of Incompass!

In closing, I would like to reiterate our deep gratitude to every individual who is a part of this remarkable journey – the staff, caregivers, community partners, employers, contractors, funders, donors, and the very people we serve. As we embark on our next strategic phase, it is our shared vision and collective passion that will guide us towards an even brighter and more inclusive future.

With deep appreciation,



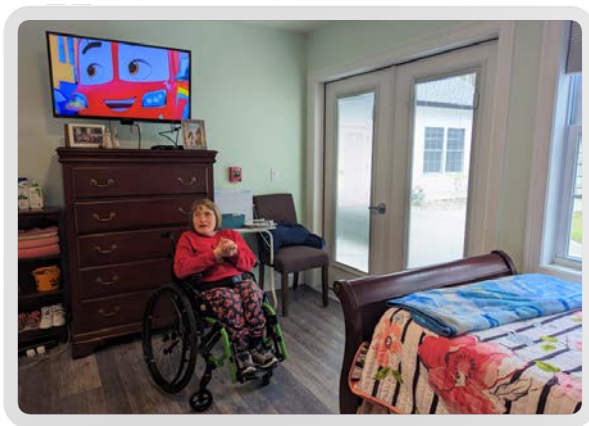
Tim Allen, Chair



RESIDENTIAL

OPENING DOORS TO CARE

Incompass Human Services continued its unwavering commitment to providing the highest quality of care in residential services throughout the year. Care Champions provide 24/7 support to group home residents, and are engaging the neighbors with community-building activity.



Opened a new accessible and ABI group home

The ABI portfolio continues to grow at Incompass with a new group home that is home to five individuals receiving ABI supports. In addition, a new fully-accessible home was opened allowing residents to move into the new space while their previous home is renovated.

Kicked off neighborhood barbecue events

A new tradition was started after the pandemic restrictions were lifted and numerous group homes held neighborhood cookouts with friends and family.

Shared Living Program Grows

The residential team successfully recruited 15 new Shared Living Provider families, extending the program's reach to even more individuals in need.





95

One of the new group homes that Incompass opened this year, adding five permanent beds to our housing capacity.

FUNDRAISING

SUPPORTING OUR MISSION

Fundraising efforts continued to flourish, enabling us to make an even greater impact. We secured donations from corporate donors to individual supporters and managed to raise for a variety of worthy causes at Incompass.

“Incompass Days of Giving”

A remarkable \$25,000 was crowdfunded by Care Champions during our 2022 Days of Giving campaign, with 85 individual donors including 38 first-time donors, demonstrating the generosity of our supporters.



Summer Barbecue Campaign

\$5,000 was raised by the residential services team to fund a series of summer barbecues at Incompass group homes.

Secured grants from numerous foundations

Grant support this year came from the Greater Lowell Community Foundation, New Balance Foundation, and Flutie Foundation.

Financial Support from the Business Community

Numerous companies came out in support of the Incompass mission, including CGI New England, Moth, Grossman Marketing, AAF CPAs, 43K Feet, and Brown & Brown.

CARE CHAMPIONS

OUR TEAM, OUR STRENGTH

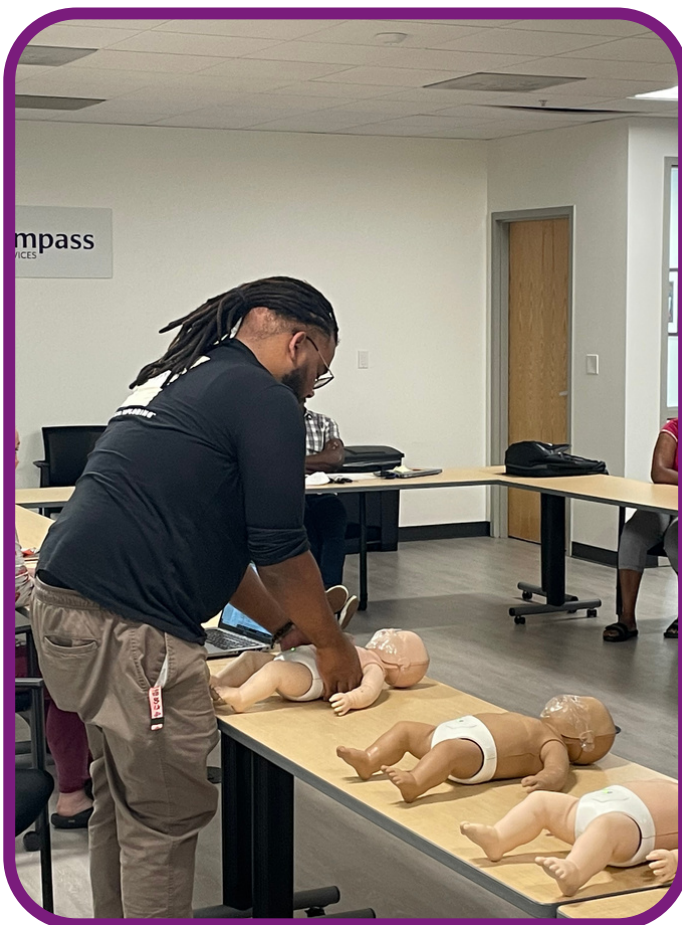
Incompass takes pride in its dedicated team members and the Care Champion culture that we have carefully cultivated over the years. Human Resources goes beyond recruitment in our agency, and our team exemplifies this approach.

Employee Engagement Survey

Achieving an impressive 8 out of 10 satisfaction score on staff surveys demonstrated our commitment to a positive workplace.

Promoted 19 Care Champions

Career growth is of the utmost importance at Incompass Human Services, and this past year 19 Care Champions were promoted to more senior roles, recognizing their dedication and expertise.



Training is a critical part of the Care Champion experience, and Incompass conducted numerous trainings in FY23. To the left, Employment Manager **Aldrin Sergile** participates in a CPR training exercise at Omni Way.

CARE CHAMPIONS

Hired 144 New Staff!

Incompass welcomed nearly 150 new staff this past year, pushing the total employment to nearly 500! All new staff participated in a revamped, two-day new employee orientation combining training, onboarding, and welcome activities.



Urban Youth Interns

The class of 2023 all completed the program, representing six different area colleges including UMass Lowell and UMass Amherst.

Training Collaboration with NEHSCO

As part of the NEHSCO affiliation, Incompass staff were able to participate in required training sessions at both Incompass and Bridgewell facilities.



Champions in our Midst

Kelly Trickett received the Greater Lowell Chamber Distinguished Young Professional award, while **Michael Bloom** earned the prestigious AAIDD Lifetime Achievement. **Claude Dossa** was honored by the Arc of Massachusetts at their Annual Meeting and **Nora Rwatangabo** was the January 2023 Caring Force Workforce Hero.

ADMINISTRATIVE

EMPOWERING EFFICIENCY AND IMPACT

Behind every success story are dedicated professionals who ensure our operations run smoothly. This past year there were significant investments in operational excellence that have modernized key Incompass operations.

Streamlined Communication

Rollout of email addresses for all Incompass Care Champions improved communication, fostering collaboration and efficiency.

Cybersecurity Enhancement

Incompass launched enhanced cybersecurity tools and protocols, safeguarding sensitive information and maintaining trust.

NEHSCO Portal

Incompass launched a single-sign-on cloud-based portal where Care Champions can access all of their online tools in a secure manner through multi-factor authentication.

Promoting Shared Living

A dynamic marketing campaign was launched driving traffic to a new web page aimed at spreading awareness for the Shared Living program and recruiting new providers.

Leadership Appointments

Incompass appointed **Kelly Trickett** to the role of COO, **Heather Mantell** to Director of Family Support and Community Engagement, and **Emily Horn** to Director of Day Programs.





ADVOCACY

A VOICE OF STRENGTH

Incompass takes pride in its dedicated team members and the Care Champion culture that we have carefully cultivated over the years. Human Resources goes beyond recruitment in our agency, and our team exemplifies this approach.

Raising Awareness: The Service Shortage

Incompass co-produced a video highlighting the lack of service available to those in need in our region that aired at The State House.

Recruiting DSPs

Incompass was a lead sponsor of a recruitment campaign - along with Northeast Arc - aimed at increasing the number of DSPs in The Arc of MA network. The campaign was developed and the group is now pursuing funding to make this a state-wide initiative.

Going the Distance

As a Board member, CEO **Jean Phelps** collaborated on the development of The Arc of MA policy agenda. Phelps also attended numerous advocacy events on Beacon Hill, and made a trip to Capitol Hill.

Sponsored the Northeast Human Services Advocacy Breakfast

Incompass was one of a group of agencies who sponsored and participated in the annual breakfast, a platform for advocacy and collaboration in the region that focused on the theme “The Weight of Waiting.”



PROGRAMS

UNLOCKING POTENTIAL EVERYDAY

Day Programs at Incompass continued to thrive and evolve, making meaningful impacts on the lives of those we serve. The focus over the past year was returning individuals to their day programs after the pandemic restrictions were lifted, an important goal as these programs provide participants with a profound sense of purpose and independence.

Return to Day Program

Throughout the year the Day Program staff were relentlessly focused on increasing program capacity at Omni Way and returning individuals to the programs they enjoyed prior to the pandemic.

New Space, New Opportunities

The TREE program successfully transitioned to a new space at Omni Way, offering enhanced resources and experiences to participants.

OQE Certified

Incompass achieved two-year OQE certification for Residential and Individual Home Supports and Employment and Day Supports.

New Year, New Services and Supports

Incompass was awarded a new contract for “active treatment” services as part of a competitive RFR bid.

Day hab attendees welcomed The O'Halloran Irish Dancers to Chelmsford for a dance lesson this past year.



PROGRAMS

Embracing Technology and Innovation

Incompass reaffirmed its commitment to leveraging the latest technology in support of ISP goals with the first video game lab and a new sensory room in our day hab space.

Remembering Those We Lost

Day of Remembrance held in memory of those individuals who sadly passed away during the public health emergency.



A memorial in memory of individuals was created as part of the “Day of Remembrance” ceremony at Omni Way.



THROUGH THE YEAR...



From community outings to hosting officials from the Department of Developmental Services, Care Champions created so many wonderful memories for the people we serve!



STRATEGY

LEADING WITH COMPASSION

Incompass Human Services is committed to a future that transforms lives, builds stronger communities, and fosters lasting impact. As we embark on this journey, our new five-year strategic plan outlines the key next steps we are taking to align with our Incompass 2030 Vision.

Demonstrating Impact

Engaged Clarasys Consultants in an engagement rooted in demonstrating our impact on the community that engaged all Incompass managers and directors in a critical thinking exercise rooted in new data practices.



New Strategic Plan

Convened a cross-functional strategic planning initiative in development of a new five-year strategic plan to be rolled out in FY24.

Balancing the Scorecard

Convened a cross-functional strategic planning initiative in development of a new five-year strategic plan rooted in the Incompass 2030 Vision.



Leveraging NEHSCO

Incompass leadership met monthly with NEHSCO leadership around strategic initiatives including training, purchasing, IT, and communications as the agency pursues growth through new affiliate partners.

COMMUNITY ENGAGEMENT

CONNECTING AND GROWING TOGETHER

Community engagement is key to our mission, and as the public health emergency protocols were rescinded we were able to get back to what we do best... fostering connections and growth for the people we serve.

Restarted the ISS Rec Program

Among the employers brought back this year after the pandemic are Charm Science and Market Basket.

Participated in LHS Career Speaker Week

Invited members from the Chelmsford community to a ceremony featuring holiday singing from our day program participants.

Employer Engagement

Welcomed new employers (and employees) to our employer program, including Market Basket

Civic Engagement Continues

Incompass team members actively engaged with numerous local trade and business organizations, and community organizations, contributing to the community's well-being.





The Incompass garden overseen by Activities Specialist **Cathy Brunelle** is a source of pride at Omni Way.

Therapeutic gardening is a core aspect of the day hab experience, and the vegetables grown by our individuals are used in the training kitchen.



COMMUNITY ENGAGEMENT

Holiday Cheer

The annual Holiday Party at Lenzi's drew a sold-out crowd and the Incompass Tree Lighting has fast become an annual tradition rooted in joy.

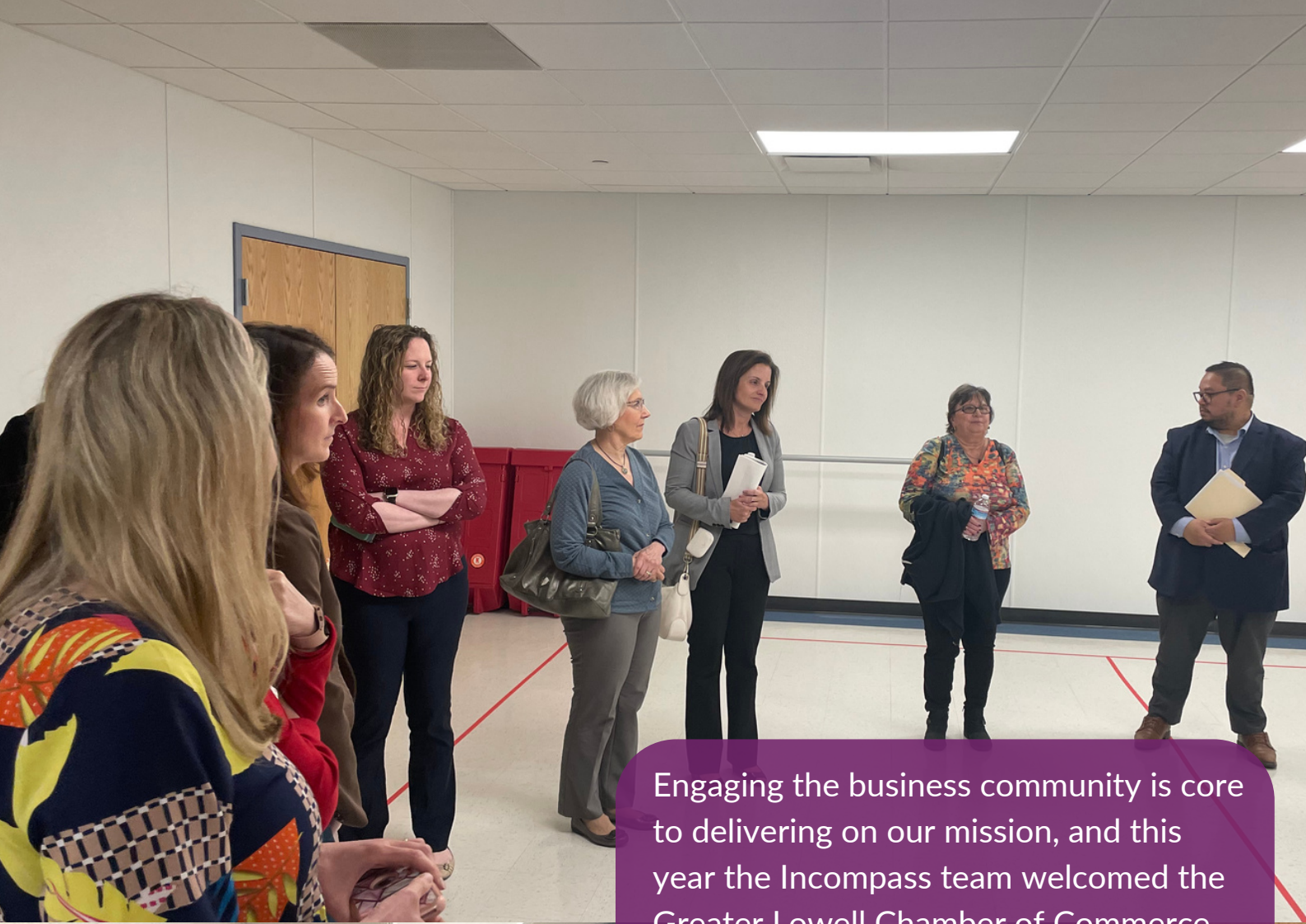
Business Community Engagement

Incompass staff participated in several engagements at area employers, including Pega in Cambridge and the Greater Lowell Chamber of Commerce.

Community Garden

Day programs continued to sponsor a plot in the Chelmsford Community Garden as part of the community-based programming.





Engaging the business community is core to delivering on our mission, and this year the Incompass team welcomed the Greater Lowell Chamber of Commerce CEO **Danielle McFadden** and the Board of Directors to tour Omni Way.



FY23 FINANCIAL STATEMENTS

Incompass Human Services
Comparative Statements of Activities
Preliminary and Unaudited
(thousands of dollars)

	FY2023	FY2022	Change
Revenue	\$29,433	\$30,081	(\$648)
Expenses			
Salaries and Related Costs	21,626	19,850	1,776
Program Costs	3,707	3,436	271
Occupancy Costs	3,415	3,183	232
Management and Admin. Costs	1,856	1,779	77
Total Expense	30,604	28,248	2,356
Operating Surplus/(Deficit)	(1,171)	1,833	(3,004)
Non-Operating Revenue/(Expense)	383	2,604	(2,221)
Net Surplus/(Deficit)	(\$788)	\$4,437	(\$5,225)

Incompass Human Services
Comparative Statements of Financial Position
Preliminary and Unaudited
(thousands of dollars)

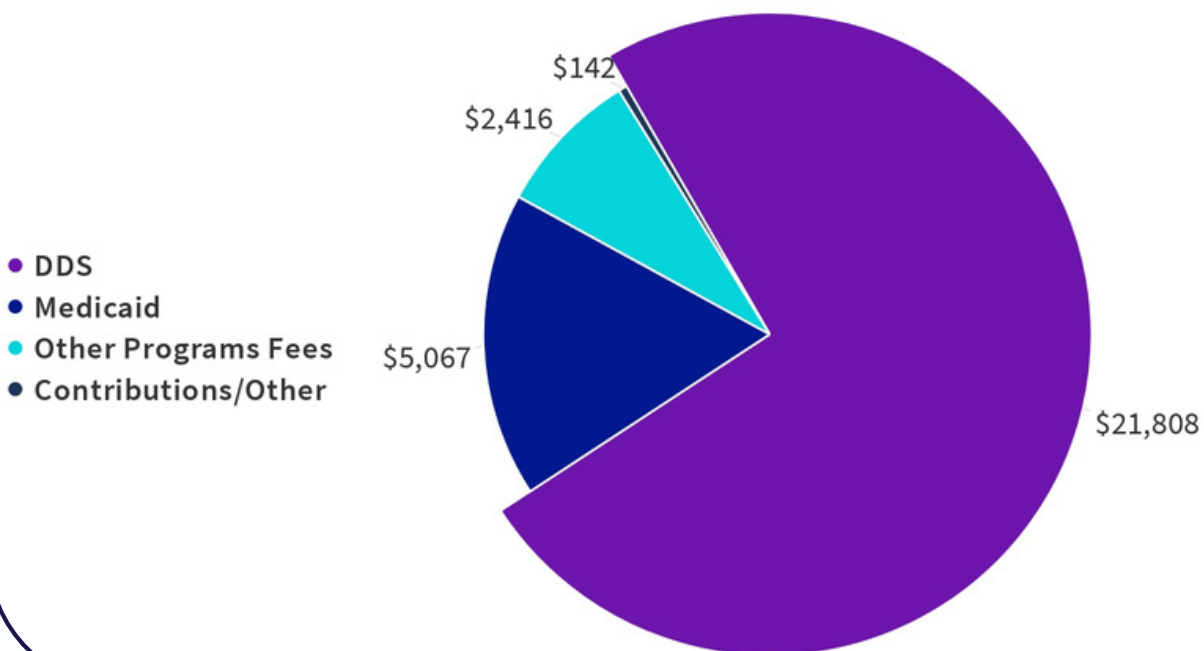
	as of 6/30/23	as of 6/30/22	Change
Assets			
Current Assets			
Cash	\$2,214	\$4,166	(\$1,952)
Account Receivable	5,449	3,941	1,508
Other Current Assets	427	361	66
Total Current Assets	8,090	8,468	(378)
Fixed Assets, net	20,932	10,092	10,840
Investments	1,910	1,716	194
Other Assets	545	423	122
Total Assets	\$31,477	\$20,699	\$10,778
Liabilities & Net Assets			
Current Liabilities			
Accounts Payable	\$604	\$276	\$328
Current Portion of Long-Term Debt	1,031	221	810
Other Current Liabilities	1,541	1,087	454
Total Current Liabilities	3,176	1,584	1,592
Long-Term Debt	18,986	9,012	9,974
Total Liabilities	22,162	10,596	11,566
Net Assets	9,315	10,103	(788)
Total Liabilities & Net Assets	\$31,477	\$20,699	\$10,778

FY23 FINANCIAL STATEMENTS

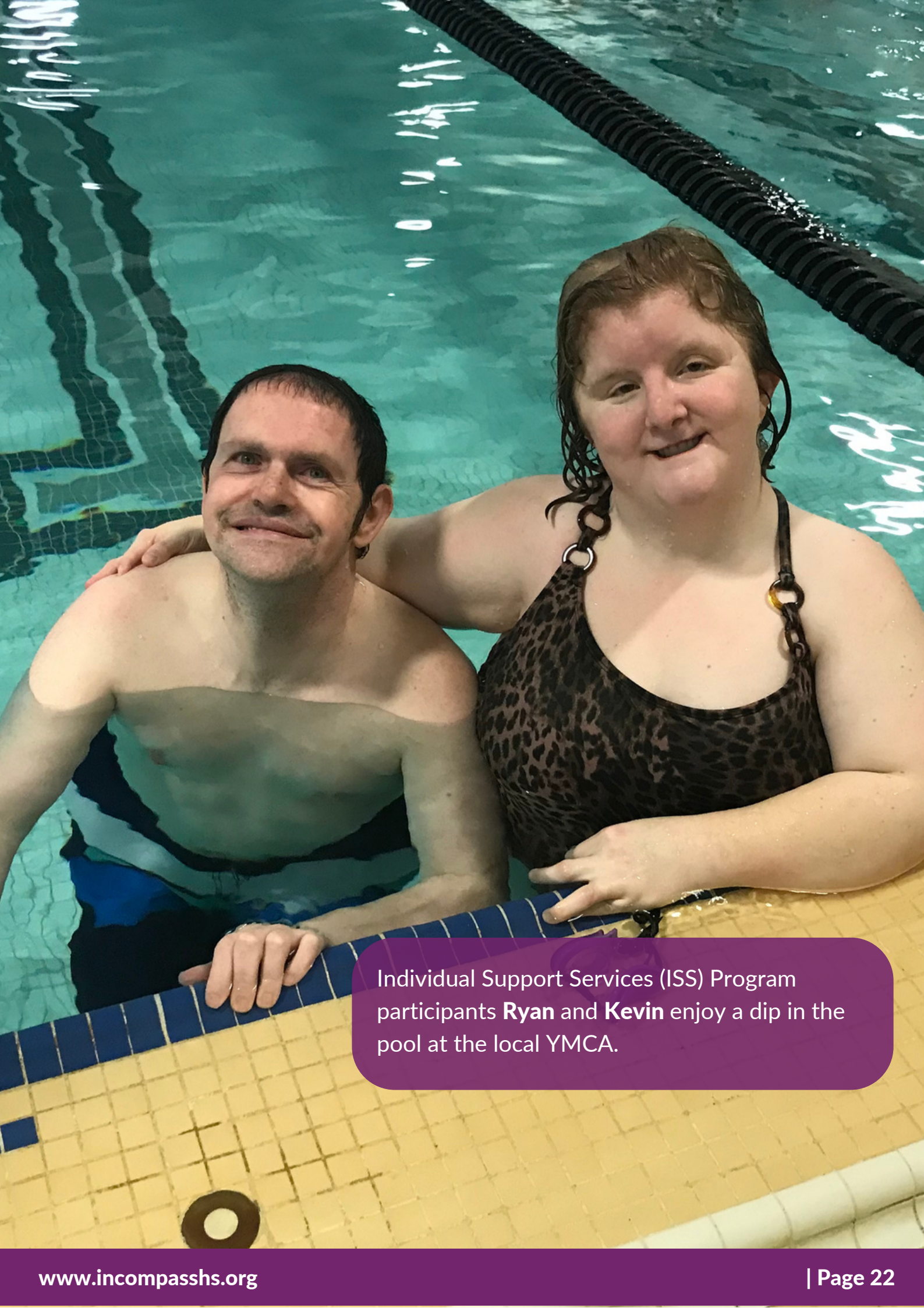
REVENUE BREAKDOWN

The breakdown of the \$30,081,000 in FY23 revenue is presented below, with the Massachusetts Department of Developmental Services (DDS) being the single largest source of revenue for the delivery of Incompass programs and services.

FY23 INCOMPASS REVENUE



(in thousands of dollars)



Individual Support Services (ISS) Program participants **Ryan** and **Kevin** enjoy a dip in the pool at the local YMCA.

LOOKING AHEAD

LEADING WITH COMPASSION

Let's take a moment to cheer on the magnificent triumphs of FY 2023, and give a round of applause to the wonderful Incompass Human Services team, our generous supporters, and the brilliant individuals and families we serve.



In the coming year, Incompass is ready to flex its muscles and keep growing our services to meet the changing needs of our community. We're opening new group homes, relocating the Safe Minds Community Center to a bigger and better spot, and unlocking new levels of insight with our cutting-edge data governance process. Our Care Champions will continue to engage with the community in pursuit of additional support. And our Board of Directors will grow in size to reflect the current and future needs of Incompass Human Services.

Together, we're creating a more inclusive and empowered community that's ready to take on the world!



Founding Affiliate



With open hearts we open doors



incompasshs.org

4 Omni Way | Chelmsford, MA 01824

