

FY
22



incompass
HUMAN SERVICES

Annual Report



"With open hearts, we open doors"

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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

Chris Snell, Director of Clinical Services

Shawn Nault, 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

Matthew Kalil, Treasurer

Steven D. Geoffroy, Clerk

Robert Anctil

Steve Hertog

Brady Holding

Brad MacDougall

Marybeth R. Massimino, CPA

Tom Rogers

Jonathan Seward

John Thibault

Emily Young

FROM THE CEO

Dear Incompass Community,

Towards the end of 2020, we began to hear a constant theme around a “return to normal.” And not just at Incompass Human Services; this was something we heard nearly every day in our interactions with others. As we head into 2023, I realize that at Incompass we have flipped this narrative – in that we have “returned to not normal!”

What I mean by that is adaptability is a way of life at Incompass! Essentially, we’re working towards a new normal that is rooted in empowering the people we serve to live their best lives. When we launched the Incompass brand in 2020, all the research we did at that time led us to a crystal clear vision...”innovating to help the most vulnerable thrive.” We’re living that now!



In the past year, we opened the Brain Injury Community Center – one of only five in the Commonwealth. We’ve broken ground to build three new group homes, one of which will be a first for us as a respite home for persons with medically complex presentations. We’ve brought all of our facility-based programs together under one roof at Omni Way. We’ve launched an assistive technology initiative in our residential and day services. And we are continuing to build the foundation of the New England Human Services Collaborative with our partner agency Bridgewell.

This year, more than any other in recent memory, though our focus as ever was on the individuals we serve, we needed to be even more attentive to the Care Champions who provide those critical services and supports. Recruitment of a talented and caring workforce has become one of our biggest challenges. Since we are dependent on the state to set our rates, we are challenged to raise wages to a level that allows Incompass to recruit and retain talented and dedicated people who embody the Care Champion culture.

As the CEO of Incompass Human Services, and a member of The Arc of Massachusetts Board of Directors – I have put more focus on advocacy for appropriate rates and commensurate wages this year, and that’s a theme that will continue in the year ahead. From publishing op-eds to collaborating with other human services agencies on a public awareness campaign, we need to lead the way on this initiative. We must ensure that the state adequately funds Chapter 257, which allows us to effectively operate programs and to compensate staff with a respectable living wage. We count ourselves fortunate that our staff vacancies are lower than the average and longevity is a hallmark of our Care Champion culture, but we are still struggling under the circumstances of a post-pandemic, inflationary economy.

When people in the community ask me what we do at Incompass, I’m fond of giving a simple and honest answer. That “we are empowerers!” Incompass helps people live their best lives, and we will never lose sight of that mission. Doing this work is rewarding and fulfilling in ways that are almost immeasurable. We are proud to be part of the community of human service providers and grateful for those things that make us unique in that company. Regardless of the challenges and changes around us, you will always find Incompass opening doors with open hearts.

With gratitude,

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

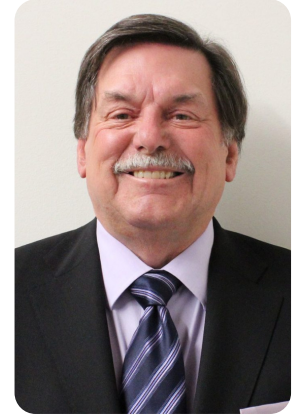
Jean Phelps, CEO

FROM THE CHAIR

To the Incompass Human Services Community,

Serving as the Chair of Incompass Human Services is one of the greatest honors of my career, and I want to start off by thanking all of you for putting your trust in me and the entire Board. We are singularly focused on the strength of this jewel of an agency, and ensuring the staff has the resources they need to be the Care Champions you all deserve.

I cannot be more thankful for the staff and everything they do – day in and day out. The stories that I constantly hear just leave me in awe of their dedication and selflessness. When you hear that a Care Champion accompanied an individual to the hospital in their time of need, and stayed with them overnight because they didn't want that person to be alone, how can you not be touched? These things happen regularly at Incompass, and we're all better for it.



Of course, Incompass hasn't been immune from the fiscal challenges that are facing virtually every nonprofit and small business, as we all are still navigating a post-pandemic environment. One thing I'm very proud of, though, is the work that leadership has done to secure federal funding to ensure the continuity of operations.

Over the past two years, Incompass has secured just over \$10 million in federal funding! By being proactive in securing funds through the PPP initiative, employer retention tax credit, and the CARES Act, we've managed to keep Incompass on steady financial ground. Incompass was also an active participant in ARPA funding, which enabled us to enhance compensation to our dedicated staff in the form of one-time bonus payments.

We're also pursuing more aggressive growth as a founding affiliate of the New England Human Services Collaborative. Along with our partner agency Bridgewell, the leadership teams are creating new economies of scale through shared resources and enhanced purchasing power that are keeping expenses down and allowing us to fast-track growth initiatives. We've made great strides in bringing the expertise of both agencies together over the past year, and anticipate tangible success in the year ahead.

I know it can sound like a cliché, but it truly is an exciting time at Incompass. We're entering a new human services climate, and under the leadership of Jean Phelps and the outstanding team she has assembled, I'm confident that Incompass will emerge as not just a thought leader, but a model for other human services agencies to emulate.

All the best,

A handwritten signature in black ink, appearing to read 'Tim Allen'. The signature is fluid and cursive, with a long horizontal stroke at the end.

Tim Allen, Chair

INNOVATION & TECHNOLOGY

Formed the Ad Hoc Assistive Technology Committee

Comprised of members of the Board of Directors and Executive Leadership team, the group was chaired by Jon Seward.

Built the NEHSCO portal

As part of our ongoing cybersecurity initiative, Incompass launched a comprehensive multi-factor authentication and password management system powered by Okta.

Launched the digital sleep-tracking program

Piloted the launch of the first smart health initiative in an Incompass group home with a noninvasive sleep tracker, giving Incompass clinicians critical health data.



incompass
HUMAN SERVICES

VIRTUAL GROUP HOME SLEEP LAB

- ➔ Motion-based tracking
- ➔ Non-invasive smart device
- ➔ Real-time analysis
- ➔ Secure data storage

UNDER-MATTRESS SLEEP ANALYZER

Featuring a simple one-time setup, the Withings Sleep Analyzer is non-invasive, and is placed under the mattress. The smart device helps improve sleep quality by offering basic sleep cycle analysis for our residents, delivering a sleep score that includes daily output of "Sleep interruptions." The Sleep Analyzer will record data in real-time during the night, no matter how you sleep.

WHAT DATA WILL WE TRACK?

Through the Health Mates app, we will initially track duration of sleep, heart rate, breathing, and movement. Individuals, guardians and selected Incompass staff will have access the daily sleep score. Of course, Care Champions will continue to monitor the group home residents with regular checks as always.

WHERE WILL THE DATA BE STORED?

The data will be anonymously stored in the Health Mates app, accessible only to those with the account log-in. Only authorized Incompass group home and clinical staff, along with individuals and guardians, will have access to the account and it won't be stored anywhere else.

WILL I HAVE TO PAY FOR THE DEVICE?

No...Incompass Human Services will pay for the device and data tracking. All you'll need to do is sign the participation form and we will take care of the rest!

INCOMPASS HUMAN SERVICES
100 MI WAY, CHELMSFORD, MA 01824

INCOMPASSHS.ORG

Installed a 360 treadmill in our day program facility

As part of our ongoing VR program, the treadmill allows a truly 4D immersive experience for our facility-based day program participants.

Created a centralized SharePoint-based intranet

Working with our managed services partner, Incompass created a truly centralized file sharing system that creates cross-departmental efficiencies.

CARE CHAMPIONS

Hosted DSP appreciation week

Incompass created a week-long celebration for our DSPs that included raffles, prizes, and a pizza party!

Continued the weekly Care Champion Bulletin

Cited by peer agencies as a model for staff communication, the Incompass marketing & communications team sends a weekly staff update showcasing Care Champions in action.



Collaborated with a group of interns as part of the Urban Youth program

The class of 2022 all completed the program, representing six different area colleges including UMass Lowell and Suffolk University.

Launched a staff anniversary initiative

Honored staff monthly with an all-staff communication celebrating anniversary dates, with a focus on milestone anniversaries.

Completed staff engagement surveys

Visited day programs and group homes to ensure high participation in the annual staff engagement survey.



FUNDRAISING

Held the first ever “Incompass Days of Giving”

The crowd-funded event was held from December 1-31 and raised \$35,000 from the community - a 74% YOY increase.



Secured retail donations from 70 first-time donors

New donors were added to the master mailing list and will be solicited for future donations.

Opened an Incompass e-commerce “Pop-Up Shop”

In partnership with Grossman Marketing, the store recorded 18 total transactions with items ranging from fleece jackets to trucker caps.



Secured grants from numerous foundations


Grant support this year came from the Greater Lowell Community Foundation, New Balance Foundation, Town Fair Tire Foundation, Flutie Foundation and Eastern Bank Foundation.



Text Give2Incompass to 71777
Msg & data rates may apply

Incompass Human Services
We're raising money for families in need in the Incompass community

On December 1, Incompass Human Services is holding our first-ever virtual 24-hour philanthropic event that we're calling the "Incompass Day of Giving." Last year, we raised \$20,000 for Incompass families in need – and we're hoping to top that amount this year. You can help us lift each other up in so many ways by making a gift or – better yet – becoming a fundraiser!



\$12,317.78 Total Raised

\$30,000 Goal

79 Donors 29 Fundraisers



Incompass Board Member Brad MacDougall (right) presents a donation check from CGI as part of the 2021 Days of Giving to Chief Marketing Officer Dan Esdale (left).

ADVOCACY

Published an op-ed in the *Boston Business Journal*

CEO Jean Phelps authored an op-ed advocating for the statute to fully-fund Chapter 257 that was featured on the cover of the *BBJ*.



Sponsored the Northeast Human Services Advocacy Breakfast

Incompass was one of a group of agencies who sponsored and participated in the annual breakfast, which returned this past year after a brief hiatus.

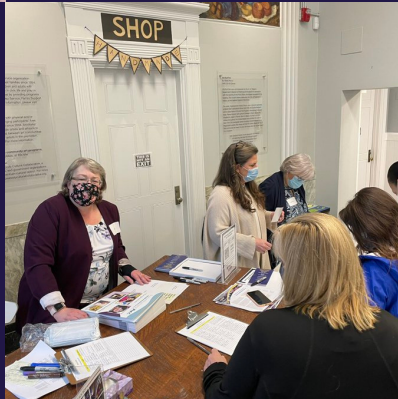
Aired human services radio campaign

Incompass Human Services was among a group of agencies who recorded radio spots advocating for the direct support workforce in Massachusetts.

ADVOCACY



2022 Northeast Human Service



Advocacy Legislative Breakfast



#ItsNoJoke

PROGRAMS

Launched the ABI Community Center

Incompass Human Services opened one of the first five ABI Community Centers in the state after being awarded the contract by MRC.

Care Champions honored by The Arc of Massachusetts

Both Heike Petermann and Emily Horn were highlighted by the organization during the year for their years of dedication to the people they serve.

Awarded two-year OQE license for residential, employment, and day supports

Incompass Human Services was cited for their “collegial approach and professional, collaborative manner in which they engaged with the survey team throughout this process.”

Launched coaching and college navigation services

Our award-winning Strive2Thrive program for people with ASD no ID began providing coaching and college navigation services.

Brought the Talent Show back!

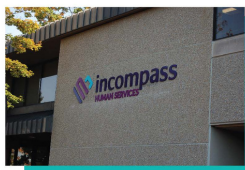
The Urban Youth interns hosted the first Incompass talent show since 2019, drawing a huge crowd the Omni Way parking lot.

Acquired Brain Injury Community Center

OVERVIEW

The Incompass ABI Community Center will seek to empower participants to maximize their level of independence, self-confidence, and dignity so they can experience full lives in their communities.

A full continuum of community-based supports will be accessible to participants, comprised of skilled clinicians and care champions that serve on an interdisciplinary treatment team.



ASSESSMENT PROCESS

Individualized services will be developed through an assessment process that results in a *person-centered action plan* with attainable and measurable goals. The identified goals will build on their strengths and align with their values and vision.

UNIQUE MODEL

Staff will encourage participation in the center's operations through a variety of Work Units.

Staff and participants will work together as joint owners of the essential activities, functions, and operations of the program.

Examples of Work Units



Maintenance of physical site



Emily is someone we point out as an example of a person who has not only found her calling, but helped those around her find their true north.

Emily Horn
Assistant Director of Day Services
Incompass Human Services

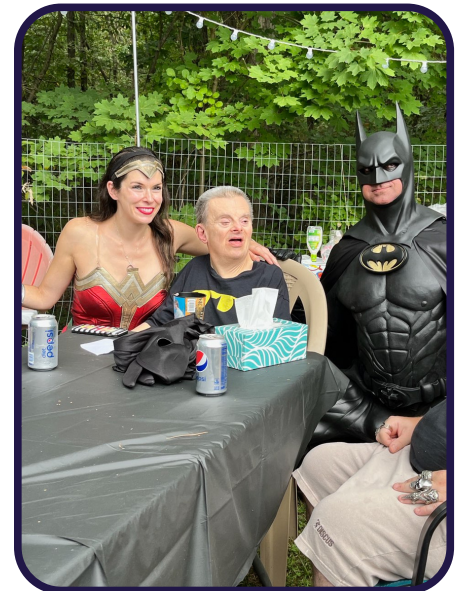
PROGRAMS



PROGRAMS



April Fools' Day Residential Style



PROGRAMS



COMMUNITY ENGAGEMENT

Engaged with numerous local trade and business organizations

Incompass team members are serving on the Boards of the Greater Lowell Chamber, Crossroad at 129 Chelmsford Economic Development Committee, AAIDD Northeast Region X, Arc of Massachusetts, and the NCE Steering Committee.

Recruited new employers to the employer program

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

Hosted the first-ever Incompass tree lighting ceremony at Omni Way

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

Held a volunteer-based Earth Day event

Hosted the BNI Power Players business group on Earth Day to help setup therapeutic gardens in our day programs.





The Incompass team, including **Director of Family Support and Community Engagement Heather Mantell** (center) and **Chief Strategy and Innovation Officer Michael Bloom** (right) at the 2021 Flutie Foundation Holiday Spectacular.



The Incompass Family Support team attends the "Bridging the Cultural and Linguistics Gap" conference put on by The Arc of Massachusetts and Department of Developmental Services (DDS).

Launched the online NEHSCO portal

Powered by Okta, the portal was a major cybersecurity upgrade for NEHSCO affiliates Bridgwell and Incompass.

Created a new ad campaign

NEHSCO print ads ran at various trade and industry conferences throughout the year driving traffic to nehsco.org.

Combined affiliate resources

With a new NEHSCO CIO in place, the affiliates negotiated a new contract with a managed service provider that covered both Incompass and Bridgwell leading to a significant cost savings.



WE DO THINGS BETTER TOGETHER.

What if we came together to build a human services system that truly works for the people in it? One door into a network of providers who collaborate to provide the personalized services and supports that we all know leads to better outcomes. What would that look like?

Meet the New England Human Services Collaborative.

We're bringing like-minded organizations together to solve our most pressing challenges and building the network that will propel the provider community forward.

Join us at nehsco.org.

Founding affiliates  

Andrew (left) is in shock as he meets Batman, his hero. A touching surprise arranged by his Shared Living Provider, Linda.



FY22 FINANCIAL STATEMENT

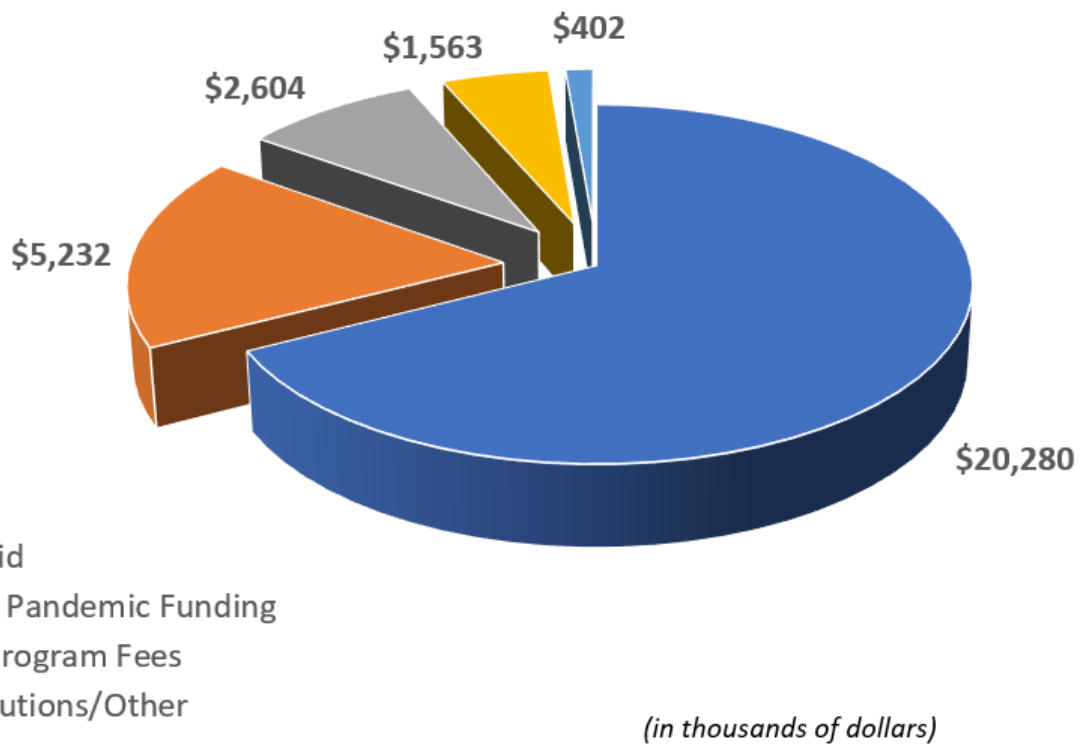
Incompass Human Services
Comparative Statements of Activities
Preliminary and Unaudited
(thousands of dollars)

	FY2022	FY2021	Change
Revenue	\$30,081	\$27,870	\$2,211
Expenses			
Salaries and Related Costs	19,850	17,367	2,483
Program Costs	4,635	4,920	(285)
Occupancy Costs	2,386	2,542	(156)
Management and Admin. Costs	1,377	1,306	71
Total Expense	28,248	26,135	2,113
Operating Surplus/(Deficit)	1,833	1,735	98
Non-Operating Revenue/(Expense)	(843)	2,723	(3,566)
Net Surplus/(Deficit)	\$990	\$4,437	(\$3,468)

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

	as of 6/30/22	as of 6/30/21	Change
Assets			
Current Assets			
Cash	\$4,166	\$1,334	\$2,832
Account Receivable	3,941	5,936	(1,995)
Other Current Assets	361	3,532	(3,171)
Total Current Assets	8,468	10,802	(2,334)
Fixed Assets, net	10,092	10,510	(418)
Investments	1,716	1,972	(256)
Other Assets	423	471	(48)
Total Assets	\$20,699	\$23,755	(\$3,056)
Liabilities & Net Assets			
Current Liabilities			
Accounts Payable	\$276	\$380	(\$104)
Current Portion of Long-Term Debt	221	3,394	(3,173)
Other Current Liabilities	1,087	1,681	(594)
Total Current Liabilities	1,584	5,455	(3,871)
Long-Term Debt	9,012	9,186	(174)
Total Liabilities	10,596	14,641	(4,045)
Net Assets	10,103	9,114	989
Total Liabilities & Net Assets	\$20,699	\$23,755	(\$3,056)

FY22 REVENUE BREAKDOWN





Our Individual Support Services (ISS) Program runs on Dunkin! **Sandy**, pictured above, enjoys a crisp fall morning on the Lowell boulevard with **Heike**, Incompass developmental specialist.

LOOKING AHEAD

In the coming year Incompass Human Services will commence work on our next three-year strategic plan. We will convene the Board and leadership of the agency as we continue our focus on the Incompass2030 vision.

We will increase our portfolio in FY22 as we open three new residences, including our first medical respite home. We are also going to be aggressive in our recruitment activity, launching new marketing campaigns aimed at onboarding new direct support professionals, shared living providers, and adult family care providers.

And above all else in the year ahead, we will be there for the people and families we serve. Because that's our mission, and that's our promise to you.





incompass

HUMAN SERVICES

With open hearts we open doors



incompasshs.org

4 Omni Way | Chelmsford, MA 01824

