

FY
21



incompass
HUMAN SERVICES

Annual Report



"With open hearts, we open doors"

LEADERSHIP

Leadership Team

Jean M. Phelps, Chief Executive Officer

Alfred Frugoli, 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

Kelly Trickett, Director of Family and Community Services

Board of Directors

Timothy J. Allen, Chair

Pamela Dalton, Vice Chair

Matthew Kalil, Treasurer

Steven D. Geoffroy, Clerk

Robert Ancil

Steve Hertog

Brady Holding

Brad MacDougall

Marybeth R. Massimino, CPA

Tom Rogers

Jonathan Seward

Daniel J. Sullivan

John Thibault

Emily Young

FROM THE CEO

Dear Incompass community,

Our founding families expressed a desire for all persons to experience a full life; a principle that motivates us to this very day. Over this past year, in the face of a global pandemic that suspended the majority of our facility- and community-based programs for months at a time, we faced extraordinary challenges to deliver on that promise.

But through adversity, we came together. We launched new, innovative programs. We hosted vaccine clinics. We developed new policies rooted in the safety of the Incompass community. We created a virtual program studio. We raised money for our struggling families. We launched our new brand. And we became a founding affiliate member of the New England Human Services Collaborative.

And through it all, we never lost sight of our founding principle. Difficult decisions were made along the way of course, including reductions in staffing and signing a purchase and sale agreement for our Parker Street facility in Lawrence. But the leadership of the agency, including the Board of Directors, took the necessary steps to minimize these steps and ensure the future of Incompass is bright!

There's an old saying I often think of during challenging times..."there's beauty in the struggle." As I write to you all today, I'm thrilled with the path that Incompass Human Services is now carving out in our mission to serve the "whole person" at every stage of their lives. The annual report details many of the new programs and initiatives we are excited to bring to market, as well as the staff-driven innovation we're seeing in our existing programs.

To all of the Incompass staff, aptly dubbed "Care Champions," I cannot possibly express my gratitude for all you are doing for our agency and the people we support. You continue to step up and put those around you first. You are always there for the vulnerable members of the community, and you do your jobs without fanfare. Your open hearts really do open doors for the people we support!

It's an honor and a privilege to lead such a dynamic and innovative organization, filled with people who are motivated by the well-being of others. As we look ahead to the post-pandemic world, our community of individuals, families, staff, donors, interns, community partners, employers, and the Board of Directors are all writing pieces of the next Incompass chapter.

And I promise you...it's a page-turner!

With gratitude,



Jean Phelps, CEO



“

For me, I feel that all the staff are super invested in all of the individuals who come through this door. I feel that Incompass does a really great job of investing their time and really getting to know the individual; not just in the ways that we have to write their goals and all of those day-to-day things, but as a whole and I think we do a really good job with that.

”

- Heather Melo, Assistant Director of Day Services

OPENING DOORS TO CONNECTION



FY21 REVENUE BREAKDOWN

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

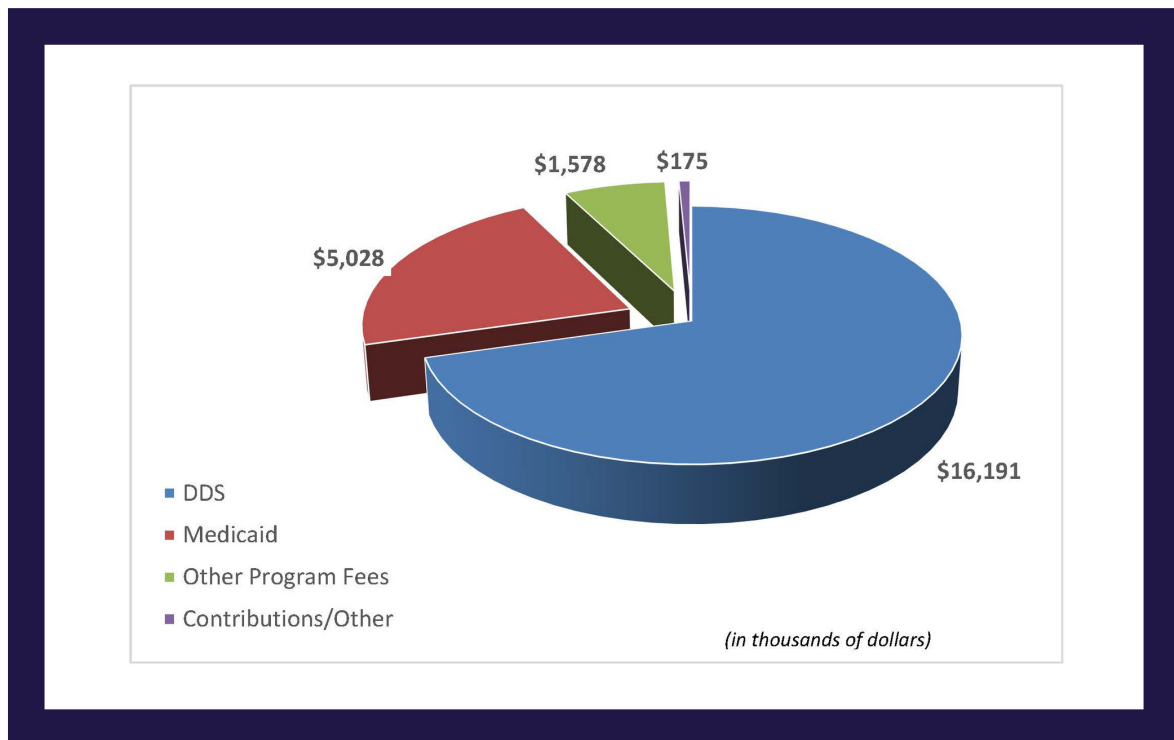
	FY2021	FY2020	Change
Revenue	\$22,972	\$28,041	(\$5,069)
Expenses			
Salaries and Related Costs	17,392	20,382	(2,990)
Program Costs	3,839	4,390	(551)
Occupancy Costs	3,448	3,053	395
Management and Admin. Costs	1,458	1,287	171
Total Expense	26,137	29,112	(2,975)
Operating Surplus/(Deficit)	(3,165)	(1,071)	(2,094)
Non-Operating Revenue	7,602	411	7,191
Net Surplus/(Deficit)	\$4,437	(\$660)	\$5,097

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

	as of 6/30/21	as of 6/30/20	Change
Assets			
Current Assets			
Cash	\$1,334	\$3,156	(\$1,822)
Account Receivable	5,936	2,582	3,354
Other Current Assets	397	405	(8)
Total Current Assets	7,667	6,143	1,524
Fixed Assets, net	12,645	10,073	2,572
Investments	2,972	2,391	581
Other Assets	471	253	218
Total Assets	\$23,755	\$18,860	\$4,895
Liabilities & Net Assets			
Current Liabilities			
Accounts Payable	\$380	\$398	(\$18)
Current Portion of Long-Term Debt	411	334	77
Other Current Liabilities	1,680	1,577	103
Total Current Liabilities	2,471	2,309	162
Long-Term Debt	12,170	11,894	276
Total Liabilities	14,641	14,203	438
Net Assets	9,114	4,657	4,457
Total Liabilities & Net Assets	\$23,755	\$18,860	\$4,895

FY21 REVENUE BREAKDOWN

The year was noteworthy because the suspension of our day programs for an extended period of time had a significant adverse impact on our monthly recurring revenue. Management made difficult decisions that included staff furloughs and the closure of our Wilmington location in order to level-set the offset of those revenues. Incompass Human Services received a PPP loan during the year - which accounts for the bulk of the non-operating revenue - and is projecting a significant increase in day program attendance in the upcoming fiscal year.



IMPACT



2,500

COVID-19 tests

1

New brand... Incompass
Human Services!

6

Incompass-hosted
vaccine clinics

20%

Increase in social media
followers

3

New residential group
homes opened

2M

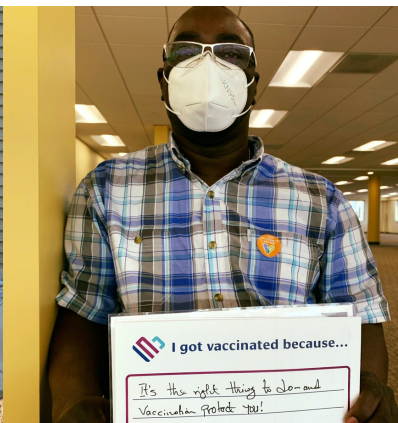
Minutes on Zoom

3,500

Virtual meetings &
events

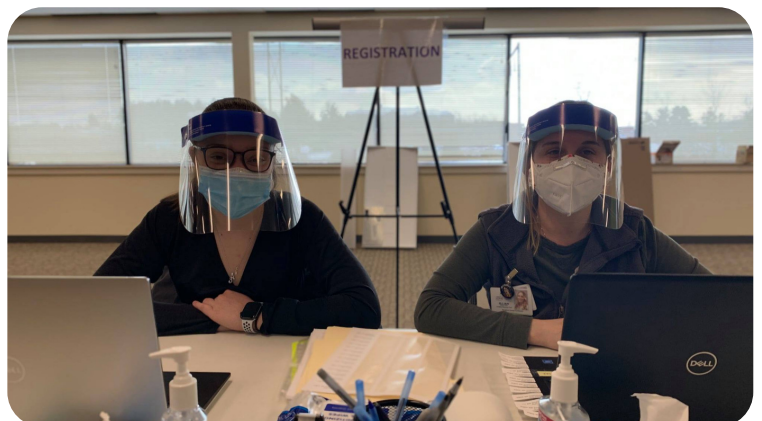
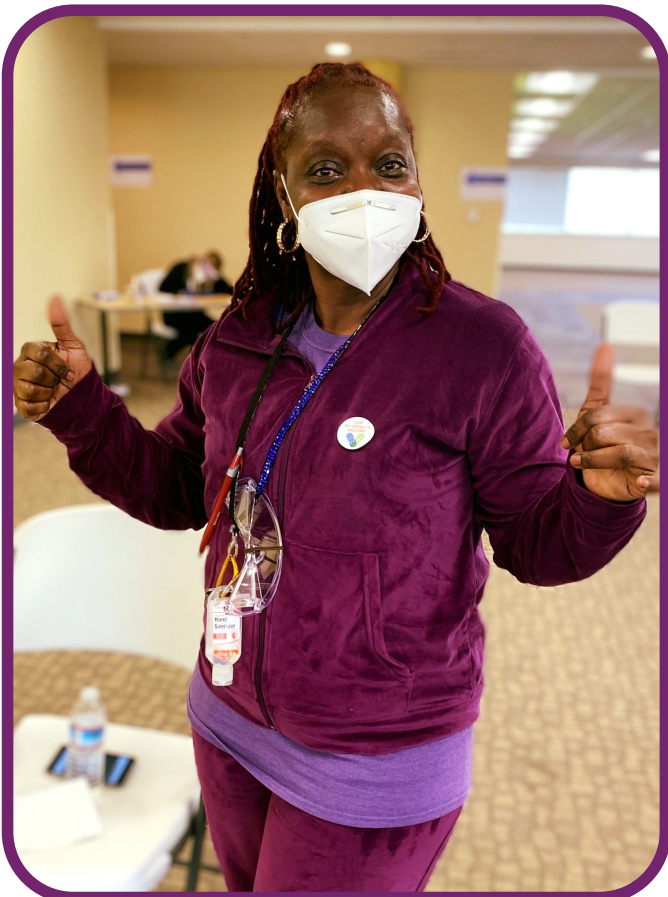
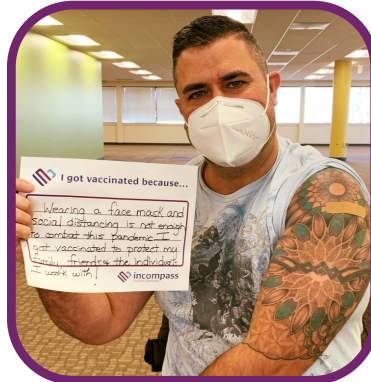
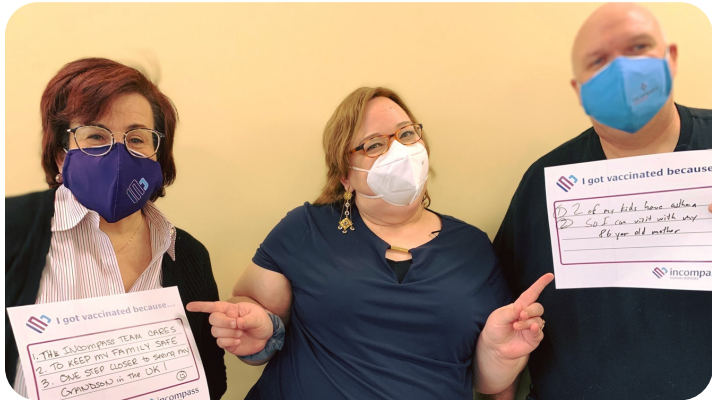
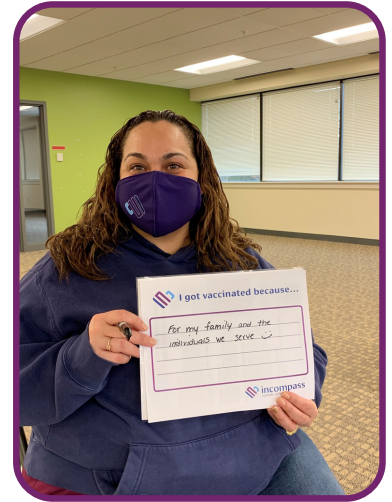
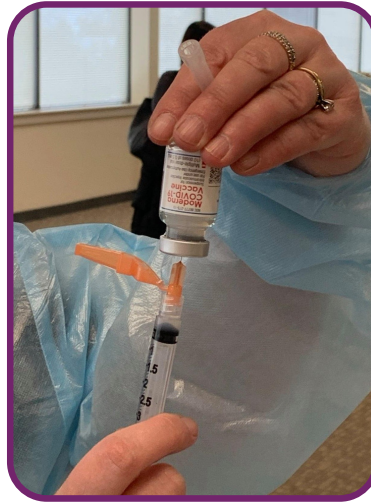
60

Families supported through
Adopt-a-Family campaign



INCOMPASS VACCINE CLINICS

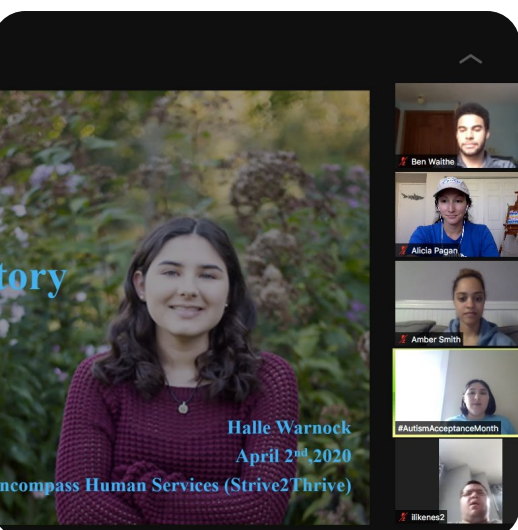
with Long Term Pharmacy Solutions



PROGRAM EXCELLENCE

Incompass continued to offer a robust portfolio of virtual programs to augment the facility- and community-based programming offered in Chelmsford and Lawrence. We were awarded new contracts by the Commonwealth of Massachusetts Department of Developmental Services (DDS) that dramatically expand our autism support and acquired brain injury (ABI) offerings. And while we are no longer serving as the Greater Lowell Family Support Center, our restructured family support and community engagement unit continues to provide critical support to families and caregivers throughout the year.

- **Earned a three-year CARF accreditation for Day Hab and AFC programs**
- **Selected by the Massachusetts Rehabilitation Commission (MRC) as one of only five providers in the state to open and run a brain injury community center (BICC)**
- **Added Life Coaching and College Navigation services to our Strive2Thrive program serving people with autism without an intellectual disability**
- **Developed an updated three-year “Program Accessibility Plan” as part of the CARF certification process**
- **Continued to bid for new services that offer a wider range of supports for people at every stage of their lives**



CHAMPIONING CARE CHAMPIONS

Our Care Champions across departments continue to go above and beyond for the people we serve! Every staff member who was subject to a furlough in 2020 was invited to return in 2021, and we created several new management positions that led to staff promotions in support of new programs and group homes. As all human services agencies struggle to recruit staff, our human services team has completely overhauled our recruiting and onboarding process as we continue to welcome new Care Champions to the team.

- **Launched a virtual orientation program anchored by a new “Care Champion” welcome video**
- **Completed a reorganization of the ISS and family support teams to add capacity for new referrals**
- **Continued our Urban Youth internship program, welcoming interns from five different colleges over the summer**
- **Aired several PSA radio spots thanking direct support professionals for their compassion and dedication during the hardest months of the pandemic**
- **Merged training systems across programs and launched new hybrid training modalities for more efficient tracking and delivering of mandated trainings**
- **Honored 50 staff members throughout the year as part of the Incompass “Care Champion of the Week” initiative**



A NEW BRAND WITH OPEN HEARTS

A highlight of 2020 was the unveiling of our new brand **Incompass Human Services**! The brand was announced at an outdoor ceremony in Chelmsford, where CEO Jean Phelps and Board Chair Tim Allen unveiled the new brand to an audience of individuals, Care Champions, town officials, families and caregivers, and Board members.



INCOMPASS INNOVATION



Innovating to help the most vulnerable thrive.



Over the past year, innovation has become a core aspect of our culture that has helped us and the people we serve to stay connected throughout the pandemic. But beyond adapting to the external environment, it's become a core focus at Incompass – at all levels of the agency. Innovation at Incompass is defined by new ideas and initiatives that advance our mission to empower individuals in need of human services to experience full lives. We're bringing on new programs, adding new supports, launching new technology, and creating new ways to help the people we serve thrive.

- **Created the first “virtual program studio” at Omni Way, a dedicated space with equipment for video conferences, podcasts, and online learning**
- **Launched a Board-level “Ad-Hoc Technology Committee” chaired by the senior engineer at iRobot Jon Seward**
- **Developed our first online, bilingual virtual program calendar**
- **Continued to offer a robust portfolio of virtual programs led by clinical specialists through our online calendar**
- **Launched the first Healthy Balance Program YouTube channel that created an on-demand fitness program for Lawrence High School students in the program**

RESIDENTIAL SERVICES AND GROUP HOMES

The Incompass residential services team embraced the necessary changes over the past year to control the pandemic. From new visitation policies to telehealth appointments to new shift schedules, the team adapted and kept all of our residents, shared living providers, and AFC caregivers safe and healthy. And through it all, we opened new group homes over the course of the year and continue to explore opportunities to expand our group home portfolio!

- Opened three new residential group homes and moved in 10 new residents, including our first residential group home for ABI residents and the only home in the state for people with Huntington's Disease
- Developed new residential service offerings related to ABI, autism, and specialized medical challenges
- Offered ongoing bi-monthly COVID-19 testing for all residential staff members and monthly testing for residentially supported participants
- Promoted multiple members of the residential services team to management to oversee the expanded group home offerings
- Continued to provide daytime supports for 65 individuals in our group homes, ensuring they remained safe, engaged, connected to their existing programs, communities, and families





“We were blown away by the [residential] staffs' commitment to the individuals and their attention to detail. To whoever designed this home – wow. It was homey, comforting and brought us a sense of peace, We know now that we have found our son’s forever home”



- Sandy, Parent of Incompass Group Home Resident



COMMUNITY ENGAGEMENT AND OUTREACH

Community engagement is more important than ever, and we continued to act as a “hub” or community connector for the individuals we serve. Care Champions connect people to resources in their community such as DTA, food banks, social recreation opportunities, respite opportunities, and health care providers. Our community services truly expanded throughout the pandemic as we assisted families struggling with food insecurities along with other financial hardships such as paying utility bills and rent.

- **Raised more than \$20,000 as part of our “Adopt-a-Family” campaign around the holidays**
- **Hosted numerous vaccine clinics for Incompass staff at Omni Way in Chelmsford in partnership with Long Term Pharmacy Solutions**
- **Distributed the new Incompass Insights eNewsletter, along with the Care Champion CareCast**
- **Provided education about the services we are offering to community members including speaking at local SEPACS and presenting to Lowell High School transition program participants**
- **Served on the Greater Lowell Community Foundation scholarship review committee for Lowell-area high school students**



THOUGHT LEADERSHIP

Incompass Human Services is a recognized leader in the field, and members of the team are sought after by other organizations for their knowledge and leadership. Throughout the year, Care Champions have been tapped by the state to lead important initiatives, invited as guest speakers in college classrooms, selected as presenters at industry conferences, and chosen to serve on numerous nonprofit boards and committees related to our mission.

- **CEO Jean Phelps** is Second Vice-Chair to the National Council of Executives of the National Arc serves on the Board of Directors for both the Arc of Massachusetts and the Association of Developmental Disability Providers. She also was the featured speaker at the Nutter McClennen & Fish 2020 virtual workshop on mergers and acquisitions.
- **CISO Michael Bloom** was elected as president of AAIDD Northeast Region X and served on the planning committee for the AAIDD 145th Annual Meeting, which was held virtually with international attendance.
- **COO Al Frugoli** is serving as the co-Chair of the ADDP Day Services Committee.
- **Assistant Director of Quality Compliance Kerry Pottle** completed her training and is now a certified CARF surveyor.
- **Director of Clinical Services Chris Snell** was elected as chairperson of the Seven Hills Central Mass Human Rights Committee and is a board member at the Walnut Street Center in Medford.
- **Director of Family Support and Community Services Kelly Trickett** was chosen as a presenter at the 2021 Arc of Massachusetts Transition Conference.
- **Medically Complex Coordinator Eileen Lee** was a featured speaker at multiple “Charting the Life Course” workshops.
- **CMO Dan Esdale** was appointed to the Board of Directors for the Greater Lowell Chamber of Commerce and co-chair of the Chelmsford Cross/Roads at 129 Business task force. Esdale is also a member of The Arc of Massachusetts Marketing Committee.

NEW ENGLAND HUMAN SERVICES COLLABORATIVE

Incompass made great strides in executing a core component of the strategic plan this year through the creation of the New England Human Services Collaborative (NEHSCO). Incompass Human Services is one of two founding affiliate members – along with Bridgewell – with Jean Phelps is serving as President and Tim Allen serving as Chair.



The new parent organization aims to build the foundation for a larger provider-driven human services network in Massachusetts offering programming ranging from early childhood education to elder services that will serve people throughout their lifetime regardless of disability or human services need. This person-centered approach to delivering vital human services, built by providers including Incompass, will eventually facilitate the creation of a centralized intake process across all agencies in the network and improve access and outcomes for those in need.



Chris Tuttle,
CEO of NEHSCO



Jean Phelps,
President of NEHSCO



THE YEAR AHEAD

As a founding affiliate of NEHSCO, Incompass is poised to continue growing its service portfolio in the new year. The agency is focusing on bolstering its information technology infrastructure in order to facilitate a seamless connection between departments and improve the experience for all of the people we support. We will continue to engage the community in our work and will be aggressive in building visibility for our brand and raising funds for our work.

But no matter what, we will always put the individuals first. After all, it's our open hearts that open doors.





incompass

HUMAN SERVICES

With open hearts we open doors



incompasshs.org

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