



# Incompass Human Services

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FY2024 - FY2028  
Strategic Plan



Founding Affiliate

## TO THE INCOMPASS COMMUNITY:

As we embark on the next chapter with our FY24-28 Strategic Plan, our first as an affiliate of the New England Human Services Collaborative (NEHSCO), we are reminded of our profound commitment to our foundational mission. Care Champions enable those people we serve with intellectual and developmental disabilities and acquired brain injuries to thrive to their fullest potential, ensuring they not only find a place in our community but truly thrive within it. We continue to work towards our Incompass2030 vision rooted in enhancing our ability to provide critical and innovative support to the people we serve. We are heartened by the strides we've made, and excited that the coming half-decade is not just about continuity; it's about transformative growth. As the landscape of human services evolves, so must we, ensuring that innovation is at the forefront, our workforce feels invested in and valued, and our services and supports are broadened to cater to the multifaceted needs of those we serve.

And that's what you'll find in the strategic plan – bold initiatives indicative of a relentless pursuit to empower these individuals and their caregivers. We are charting an ambitious path to scale our agency as a part of NEHSCO, and central to this growth is our dedication to investing in our Care Champion workforce. Recognizing their pivotal role, we aim to foster an environment of continuous learning, engagement, and palpable career growth opportunities. Parallely, we are on a quest to invigorate our Board of Directors by onboarding even more experienced leaders whose unique skillsets align with and amplify our strategic objectives. And as we grow, we are committed to maintaining operational and administrative excellence, using data-driven methods to ensure that our expansion is matched by the resources and efficiency required to uphold and further our mission.

This plan is not just a roadmap for Incompass Human Services; it's a testament to our collective ambition, vision, and unwavering belief in the potential of every individual within our care. Together, we are crafting an inclusive future of unparalleled impact and service. Together, we are growing with purpose and leading with compassion.



**GOAL #1:** Grow to become at least a \$100 Million organization within 5 years through diversification of revenue and market consolidation in response to community need.

**OBJECTIVE #1:** Building on Incompass' foundation of excellence by growing Residential, AFC, and Shared Living programs to achieve 5% per year revenue growth.

**MEASUREMENT(S):** Revenue Growth of 5% per year in targeted programs.

## HOW WILL WE ACCOMPLISH THIS?

**Assess and maximize opportunities for growth within the targeted programs (Residential, AFC and Shared Living).**

- Responding to RFRs.
- Responding to DDS requests to develop and/or grow existing programs.
- Maximize available funding opportunities.
- Audit housing stock needs.
- Optimize home procurement and sourcing process.

**Grow open referral programs (e.g., AFC and respite programs) through inbound and outbound marketing tactics.**

- Optimize website.
- Launch outbound digital marketing campaign for AFC and Shared Living.
- Host Incompass Caregiver event that includes AFC and Shared Living.
- Identify and empower marketing mavericks for story curation.
- Build real-time marketing analytics.

**GOAL #1:** Grow to become at least a \$100 Million organization within 5 years through diversification of revenue and market consolidation in response to community need.

**OBJECTIVE #2:** Add one to two new programs or services through innovation, pilots, new revenue streams.

**MEASUREMENT(S):** Number of new programs added each year and associated revenue increases.

## HOW WILL WE ACCOMPLISH THIS?

**Systematize and prioritize activities of Incompass staff to research, target, and respond to new funding opportunities for new programs through RFRs, grants, and Incompass-driven innovation.**

- Respond to RFR opportunities throughout plan years.
- Develop innovation campaign.
- Research other EOHHS funded opportunities.
- Create EOHHS communication vehicle that promotes Incompass experience and innovative programming.
- Research and seek grants.
- Pursue federal funding opportunities.
- Explore Private Pay Options for various services.
- Expand respite service offerings.
- Explore ways to identify and then address unmet family needs.

**GOAL #1:** Grow to become at least a \$100 Million organization within 5 years through diversification of revenue and market consolidation in response to community need

**OBJECTIVE #3:** Expand philanthropy as a source of support.

**MEASUREMENT(S):** Number of total donors, number of new donors, number of foundation and corporate donors, and number of grant applications submitted. Year over year change in dollars and numbers of donations. Success rate of grant applications. Revenue increases from sources: grants, retail donations, corporate and foundation donors, and major gifts.

## HOW WILL WE ACCOMPLISH THIS?

### Create a target for philanthropic giving.

- Explore philanthropic grant opportunities as they arise.
- Generate target list of philanthropic companies and donors in the region, launch outbound philanthropy campaign.
- Identify new or existing program expansion to be supported by philanthropy.
- Launch Board Philanthropy Committee, create a Board fundraising toolkit.
- Conduct competitor research around fundraising, assess and optimize fundraising technology stack.
- Audit existing fundraising activity and partners, develop fundraising collateral, launch fundraising digital tools.
- Host 70th anniversary fundraising event(s).
- Complete organization design initiative focused on creating fundraising roles and updated job descriptions.
- Optimize donor database to meet these strategies

**GOAL #1:** Grow to become at least a \$100 Million organization within 5 years through diversification of revenue and market consolidation in response to community need

**OBJECTIVE #4:** Grow \$35MM in revenue through mergers and acquisitions by closing one to two deals.

**MEASUREMENT(S):** Increased revenue as a result of (a) merger(s) or (b) acquisition(s).

## HOW WILL WE ACCOMPLISH THIS?

### Magnetize new potential M&A partners.

- Sign LOI with potential merger partner.
- Identify other potential targets.
- Close deal with new merger partner.

**GOAL #2:** Improve Incompass' overall operational efficiency to achieve an annual 1% net operating surplus in each of the next five years.

**OBJECTIVE #1:** Conduct an organizational assessment of operational efficiency and effectiveness.

**MEASUREMENT(S):** Generating a reporting mechanism on data driven benchmarks for effective decision making, best practices and to show impact.

## HOW WILL WE ACCOMPLISH THIS?

**Determine what data is needed for routine and regular measurement and reporting.**

- Create an internal data governance team.
- Determine measures of effectiveness and efficiency.
- Determine department level data collection that feeds the final report.
- Determine the structure of the assessment:
  - Baseline
  - Historical reporting trends
  - Market trends
  - Market\Competitor research
- Conduct data summit 2.0.
- Implement use of BI tools for data capture, analysis and decision making.

**GOAL #2:** Improve Incompass' overall operational efficiency to achieve an annual 1% net operating surplus in each of the next five years

**OBJECTIVE #2:** Ensure that Incompass creates an organization structure and leadership model that supports current agency functions and also supports the growth of the organization in line with this strategic plan while ensuring continuous operational efficiency.

**MEASUREMENT(S):** Achievement of Strategic Goals within stated timelines. Annual progress and achievement in balanced scorecard goals. Achievement of annual budgeted personnel goals within projected expense targets.

## HOW WILL WE ACCOMPLISH THIS?

### Match talent to present and future organizational needs.

- Assess current structure and identify talent gaps.
- Continually assess and acquire technology that ensures workforce proficiency to maximize effectiveness.
- Standardize a rubric that defines the methodology that Incompass will utilize when increasing staffing because of growth.
- Evaluate and adjust job functions and organizational design to assure congruence with the present and future needs of the organization on an annual basis.



**GOAL #2:** Improve Incompass' overall operational efficiency to achieve an annual 1% net operating surplus in each of the next five years

**OBJECTIVE #3:** Maximize the use of existing and newly acquired program spaces so that Incompass' facilities are optimized for maximum revenue generation.

**MEASUREMENT(S):** Increases in enrollment and program utilization.

## HOW WILL WE ACCOMPLISH THIS?

**Create a culture of alignment and sharing among programs to maximize use of space and meet operational needs.**

- Review capacity for each program with current allocated space.
- Complete annual review to analyze the use of all space.
- Continue to assess progress with Accessibility/Technology Plans.
- Articulate Incompass' standards for program esthetics and maintenance to ensure optimal comfort, convenience, and program effectiveness.

**GOAL #2:** Improve Incompass' overall operational efficiency to achieve an annual 1% net operating surplus in each of the next five years

**OBJECTIVE #4:** Establish, maintain, and routinely assess a data management and governance plan for Incompass that aligns with our strategic and corporate objectives.

**MEASUREMENT(S):** Data governance plan established, implemented, and routinely evaluated.

## HOW WILL WE ACCOMPLISH THIS?

### **Establish Digitalization & data governance processes.**

- Conduct data summit 2.0
- Standardize and create digital forms of data collection and processing to reduce manual effort and improve consistency of organizational reporting practices.
- Develop standardized data governance structure within SharePoint and Awards systems to improve data maturity across organization.
- Create implementation plan for tablet use across program, inclusive of staff training.

### **Aggregate and analyze data with an impact focus.**

- Develop input system to receive data and map to the dashboard for aggregation.
- Identify KPIs across programs and build relevant modules within dashboard to track progress.
- Design reports to be shared with various stakeholders on set cadences.

### **Disseminate and train key staff on the parameters of the Incompass data governance plan.**

- Establish procedures.
- Articulate formal reporting mechanisms.
- Publish data to SharePoint and dashboards.
- Seek feedback and continuous improvement on data collection, quality, outcomes and measures.

**GOAL #2:** Improve Incompass' overall operational efficiency to achieve an annual 1% net operating surplus in each of the next five years

**OBJECTIVE #5:** Adopt technologies implemented by the NEHSCO network to generate cost savings, standardization, and unification of data and systems.

**MEASUREMENT(S):** Incompass cost savings and affiliate performance.

## HOW WILL WE ACCOMPLISH THIS?

### **Implement and introduce NEHSCO initiatives to Incompass affiliates.**

- Internal marketing and utilizing NEHSCO resources.
- Actively participate to bring innovative ideas to improve NEHSCO operations.
- Launch new affiliate satisfaction surveys.
- Create the NEHSCO Affiliate Toolkit.

### **Identify administrative functional cost savings opportunities through integration planning with Incompass affiliates.**

- Establishing peer to peer relationships among Incompass and affiliates.
- Matching organizational talent to the needs of Incompass and affiliates.
- Explore sharing personnel resources.
- Launch NEHSCO purchasing plan.

**GOAL #3:** Enhance the Care Champion culture by empowering Incompass' workforce with opportunities for advancement, leadership development, improved staff benefits and long-term succession planning.

**OBJECTIVE #1:** Evaluate Incompass' pay, benefits structure, salary scales and recognition programs to ensure an equitable, competitive package to improve recruitment, retention, and employee satisfaction.

**MEASUREMENT(S):** Turnover and vacancy rates compared to baseline and industry benchmarks. Annual Care Champion engagement survey results.

## HOW WILL WE ACCOMPLISH THIS?

### **Establish attractive and equitable employment and compensation plans.**

- Update job descriptions across the agency to accurately reflect each position.
- Evaluate the salary structure for all non-union positions across the agency.
- Research, evaluate and make recommendations to overall compensation plan design options for Incompass.
- Implement revised compensation structure for all non-union positions.
- Monitor and adjust the compensation plan annually or as needed to address salary compression issues proactively and systematically.
- Redesign performance management system, incorporating measurable and impactful goals for staff.
- Evaluate and make recommended changes to the benefit contribution strategy and waiting period for all benefit offerings.
- Conduct a benefit survey to ensure benefit offerings are in-line with staff needs.

**GOAL #3:** Enhance the Care Champion culture by empowering Incompass' workforce with opportunities for advancement, leadership development, improved staff benefits and long-term succession planning.

**OBJECTIVE #2:** Develop new recruitment pipelines and create partnerships that reduce the number and length of time positions remain vacant.

**MEASUREMENT(S):** Turnover and vacancy rates, length of time from posting to positions being filled, performance against peer agencies or industry benchmarks.

## HOW WILL WE ACCOMPLISH THIS?

### Establish Incompass as one of the “Best Places to Work.”

- Expand internship programs at Incompass by developing community partner relationships with high schools, and local colleges and universities.
- Implement consistent stay and exit interview processes to better understand reasons for turnover.
- Identify and train Care Champion culture ambassadors to promote the agency both internally and externally, strengthening an inclusive and welcoming culture.

**GOAL #3:** Enhance the Care Champion culture by empowering Incompass' workforce with opportunities for advancement, leadership development, improved staff benefits and long-term succession planning.

**OBJECTIVE #3:** Expand Incompass' capabilities and effectiveness in promoting professional development, career ladders, and succession planning as a key element of the Incompass employment experience.

**MEASUREMENT(S):** Turnover and vacancy rates compared to baseline and industry benchmarks. Number of internal promotions.

## HOW WILL WE ACCOMPLISH THIS?

**Maximize use of internal and external resources to promote professional development.**

- Work with affiliates to develop a leadership academy training for all levels of the organization.
- Develop “training tracks” within the Relias training platform for continuous learning opportunities for staff.
- Explore the feasibility of a mentor program within the agency.
- Create training in specialized populations (ASD, ABI, Huntington's) for staff in those programs – as well as those who desire to expand their career options.
- Provide education on Career Growth opportunities.

**GOAL #3:** Enhance the Care Champion culture by empowering Incompass' workforce with opportunities for advancement, leadership development, improved staff benefits and long-term succession planning.

**OBJECTIVE #4:** Invest in the Incompass culture through continuous focus on cultural competency and JEDI (Justice, Equity, Diversity, and Inclusion).

**MEASUREMENT(S):** Results of Care Champion surveys as compared to baseline. Individual and staff satisfaction surveys.

## HOW WILL WE ACCOMPLISH THIS?

**Develop cultural competency among Care Champions to maximize employee engagement and belonging.**

- Engage Leadership with Cultural Awareness Training and the JEDI journey.
- Seek internal stakeholder input.
- Explore External Expert Resources.
- Revise Cultural Awareness Training with the JEDI framework.
- Design Supportive infrastructure to embark on the JEDI journey.
- Craft a JEDI statement.
- Identify JEDI Commitments – Care Champion Culture, Person Served/Family, and Communities.
- Develop Action Plan – with JEDI Key Performance Indicators.
- Implement Plan and engage Incompass stakeholders.
- Communicate outcomes and actions to the Incompass community.

**GOAL #4:** Develop and strengthen the Incompass Board to be emblematic of a \$100M organization.

**OBJECTIVE #1:** Incompass Board members will be actively engaged in their board service at a level that challenges each member to fully leverage the members' skills and foster a high level of participation.

**MEASUREMENT(S):** Attendance at meetings, participation in non-meeting events, fundraising efforts of individual members.

## HOW WILL WE ACCOMPLISH THIS?

**The Board of Directors will hold itself accountable for establishing and maintaining participation to support the goals and objectives of the organization.**

- Revisit and reissue the Incompass Board member “job description.”
- Share meeting attendance expectations and follow-up in a timely manner when continuous absences occur.
- Revisit and re-issue committee charters so that each member can make choices as to what areas of Incompass governance they can bring their individuals talents to.
- Through annual self-assessment, board members will identify their own “succession plan”, to advance their personal performance on the board and ensure stability within board offices.
- The Board will report annually on its performance.



**GOAL #4:** Develop and strengthen the Incompass Board to be emblematic of a \$100M organization.

**OBJECTIVE #2:** Establish a culture of philanthropy that ensures the Incompass Board is a lead driver of organizational change.

**MEASUREMENT(S):** 100% Board giving participation. Increases in board led philanthropy dollars and contacts (# of total donors, # of new donors, # of foundation and corporate donors). Year over year change in dollars and numbers of donations.

## HOW WILL WE ACCOMPLISH THIS?

### Identify and commit to specific fundraising targets.

- Establish a philanthropy committee of the Board.
- Recruit members who have a complementary skill set to assist Incompass to lead philanthropic efforts.
- Assess and evaluate a variety of fundraising methods, programs, and events.
- Articulate a fundraising and philanthropy plan for the Board.
- Establish annual Board philanthropy goals in alignment with Incompass strategy.

**GOAL #4:** Develop and strengthen the Incompass Board to be emblematic of a \$100M organization.

**OBJECTIVE #3:** Maintain Board membership in keeping with Incompass by-laws and in keeping with meeting Incompass' goals and strategies.

**MEASUREMENT(S):** Total number of members, total new members recruited. Succession planning that ensures executive committee roles are fulfilled each year.

## HOW WILL WE ACCOMPLISH THIS?

### **Recruit up to six new Board members in 2024.**

- Distribute prospectus to Board member networks.
- Train board members in the process of recruitment and onboarding new members.
- Focus efforts on JEDI as an integral part of Board recruitment efforts.
- Conduct annual needs assessments to (re)identify talents and skills of potential members who can assist Incompass to achieve its strategic goals.

### **Establish a succession planning for current Board Members and Board Officers.**

- Articulate a tool to use for members to self-report succession goals.
- Revisit membership, terms, and turnover for each board position to ensure consistency year over year.
- Create a process to guide and mentor Board members to assume leadership roles.

**GOAL #4:** Develop and strengthen the Incompass Board to be emblematic of a \$100M organization.

**OBJECTIVE #4:** The Board of Directors is fully aware and educated on the systems, policies, procedures, processes that impact the day-to-day decision making of Incompass as we focus on the growth and the future plans of the organization.

**MEASUREMENT(S):** Board self- evaluations reflect high levels of engagement and knowledge. Member attendance at meetings. Participation in committees and meetings.

## HOW WILL WE ACCOMPLISH THIS?

**Develop an education curriculum/program for the Board to enable improved governance oversight, ownership, and autonomy.**

- Adjust Board agenda to be in conformance with the Incompass' strategic goals and vision.
- Assess and evaluate the process for reporting and information sharing at meetings to maximize board member education.
- Increase staff and board member engagement through shared committee work.
- Implement a structure for educational content and/or guest speakers as routine components of board meetings.
- Re-visit the Orientation handbook for board members to include additional resources on an ongoing basis.



# incompass

HUMAN SERVICES

With open hearts, we open doors



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