incompass
HUMAN SERVICES

FY26
ANNUAL REPORT



INCOMPASSHS.ORG

ANNUAL REPORT

TABLE OF CONTENTS

Vision, Mission, and Culture	3
From our Board Chair & CEO	4
FY26 At a Glance	7
Financial Reports	8
Residential Services	11
Programs	13
Community	16
Care Champions	21
Fundraising & Philanthropy	24
Looking Ahead	26

incompass
HUMAN SERVICES

VISION

To be the premier gateway for fulfilling life-long human service needs.

MISSION

To empower individuals in need of human services to experience full lives in their communities with supports that are innovative, personalized, and valued.

CULTURE

We are Care Champions. A team of adaptable, collaborative, diverse, mission-driven individuals with a passion for purposeful innovation and service excellence. Our community commits itself to being inclusive and welcoming as we put the whole person at the center of everything we do.

FROM BRAD

When I think about the past year at Incompass, I keep coming back to one word: trust. Families trust us with the people they love most. The individuals we support trust us to help them dream big. And our Care Champions trust that we will stand behind them as they show up, day after day, with compassion and creativity.

The Board's job is to honor that trust. This year, that meant staying focused on what matters most.

Mission first. Every decision is measured against the vision of our founding families: safe, joyful, person-centered environments where people are encouraged to learn, grow, and belong. In FY26, we expanded opportunities for greater independence and choice through new and continued community-based programs and supports.

Strong stewardship. State funding covers the essentials, but not everything that makes the Incompass experience what it is. The Board takes seriously its responsibility to steward resources wisely and protect our financial health, so we can keep our promises for the long term. In FY26, revenue grew to $45.7 million and net assets increased to $15 million, positioning Incompass for continued stability and growth.

Quality and accountability. Families and funders should expect excellence, and we hold ourselves to it. In FY26, we strengthened Quality & Compliance and invested in tools like Motivity and iQUIC to improve data, outcomes, processes, and continuous improvement across the organization.

Investing in our people. Our Care Champions are our greatest strength. Supporting our Care Champions and creating a place where great people want to build careers are among the most important things we can do for the individuals we serve.

I want to say something directly to Jean. Thank you for your leadership and your steady, caring hand on this organization. The Board is grateful to be your partner.

To every member of the Incompass team, thank you. Your work is meaningful, it changes lives, and it matters more than you may know.

To our donors, families, and community partners, thank you for believing in what is possible. As we work to bring our strategic plan to life, we are always eager to talk with people who want to join us, whether as a donor, a volunteer, or a future Board member, and help shape what comes next.

I am honored to serve alongside a committed Board, and grateful every day to be part of this community. At Incompass, we are all Care Champions.

With gratitude,



Brad MacDougall, Chair, Board of Directors



FROM JEAN

As I reflect on FY26, what stands out most isn't simply how much we've accomplished, but the moments that remind us why our work matters. Every new skill learned, friendship formed, employment opportunity created, and milestone celebrated represents something meaningful for the individuals and families we support.

This year brought exciting progress across Incompass Human Services. We expanded opportunities for individuals to live more independently, strengthened our programs, and introduced new approaches to delivering personalized supports. From exploring innovative technology to creating meaningful community experiences, we continued to find new ways to empower individuals to pursue their goals and live full lives.

I'm especially proud of the connections we continue to build beyond our walls. Our partnerships with local businesses, schools, and community organizations are creating opportunities for employment, learning, exploration, and inclusion. These relationships remind us that building stronger, more inclusive communities is something we accomplish together.

None of this happens without our incredible Care Champions. Their compassion, creativity, and willingness to embrace new ideas are what make Incompass special. This year, we celebrated their achievements, invested in their professional growth, and continued building a culture where every Care Champion feels valued and supported. As we look ahead to FY27, I'm energized by what's possible. We will continue to explore new opportunities, embrace innovation, and strengthen the connections that make a meaningful difference in people's lives.

To our Care Champions, individuals and families, Board of Directors, and community partners, thank you for being part of our journey. I'm grateful for all we've accomplished together and excited for what comes next.

With gratitude,



Jean Phelps, Chief Executive Officer



LEADERSHIP

Executive Leadership and Management Teams



Jean M. Phelps, Chief Executive Officer
Kelly Trickett, Chief Program Officer
Adam Shuster, Chief Financial Officer
Rebecca Rausa, Chief Human Resources Officer
Danielle McFadden, Chief Marketing Officer
Michael Bloom, Chief Strategy & Innovation Officer



Emily Horn, Director of Day Services
Brandon Richard, Clinical Director
Claude Dossa, Director of Residential Services
Kaitlin Macdonald, Director of Family & Community Services
Kayla Mulcahy, Director of Human Resources
Bill LaBelle, Director of Operations

Incompass Board of Directors - FY26

Brad MacDougall, Chair
Tom Rogers, Vice Chair & Treasurer
Emily Young, Clerk
Timothy J. Allen, Chair Emeritus
Rich Blatt
Amee Dhoria
Kerri Dixon
Carolyn Dunn
Vincent Geromini
Mary Petricone
John Stempeck



FY26 AT A GLANCE

1,000+
Individuals & Families Served



704
Care Champions



$45.7 Million
Annual Revenue



22
Residential Homes



172
Donors



57
New Donors

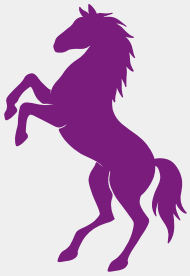




Expanded Living Opportunities:
New DDS Supported Collaborative Living and Independent Living Supports contract



Three AAIDD awards recognizing Incompass leadership



25 sponsors for Stride for a Cause

FINANCIAL REPORTS

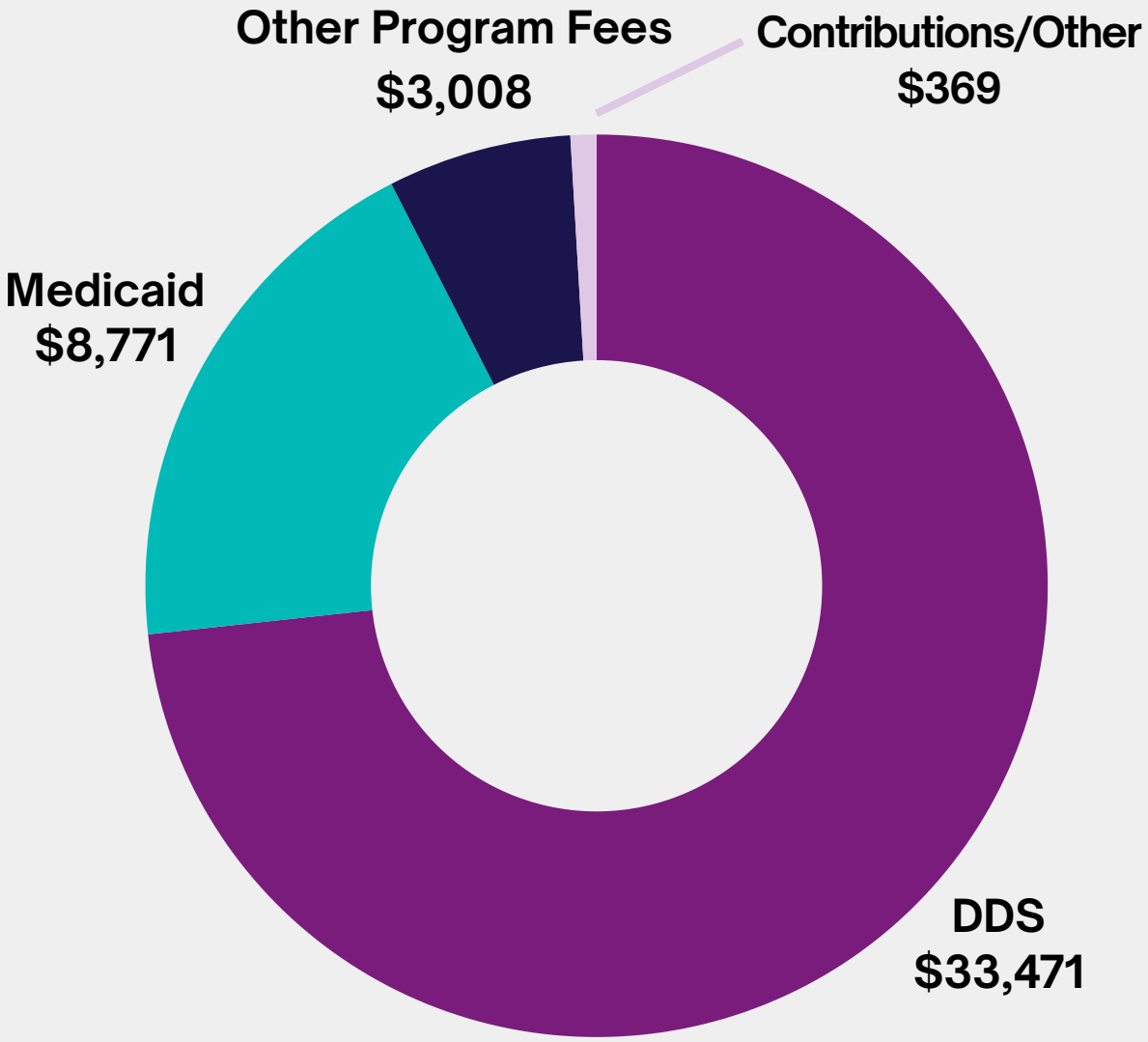
Comparative Statements of Activities
Preliminary and Unaudited
(thousands of dollars)

	FY26	FY25	Change
Revenue	**$45,674**	**$44,613**	**$1,061**
Expenses			
Salaries & Related Costs	32,387	29,665	2,722
Program Costs	4,938	4,775	163
Occupancy Costs	4,263	2,874	1,389
Management & Admin Costs	2,843	3,926	(1,083)
Total Expense	**44,431**	**41,240**	3,191
Operating Surplus / (Deficit)	1,243	3,373	(2,130)
Non-Operating Revenue/(Expense)	614	(92)	706
Total Operating Surplus	**$1,857**	**$3,281**	**($1,424)**

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

	as of 6/30/26	as of 6/30/25	Change
Assets			
Current Assets			
Cash	$6,676	$6,569	$107
Accounts Receivable	4,720	3,731	989
Other Current Assets	421	456	(35)
Total Current Assets	**11,817**	**10,756**	**1,061**
Fixed Assets, net	32,153	30,028	2,125
Investments	3,323	2,966	357
Other Assets	404	351	53
Total Assets	**$47,697**	**$44,101**	**$3,596**
Liabilities & Net Assets			
Current Liabilities			
Accounts Payable	$936	$428	$508
Current Portion of Long-Term Debt	908	938	(30)
Other Current Liabilities	2,003	2,351	(348)
Total Current Liabilities	**3,847**	**3,717**	**130**
Long-Term Debt	28,893	27,125	1,768
Total Liabilities	**32,740**	**30,842**	**1,898**
Net Assets	14,957	13,259	1,698
Total Liabilities & Net Assets	**$47,697**	**$44,101**	**$3,596**

FY26 Sources of Revenue
Preliminary and Unaudited
(thousands of dollars)



HIGHLIGHTS

Revenue Growth
↑ 2.32%

Net Assets
$15 Million

Total Surplus
$1.86 Million (4.07%)

Total Assets
$47.7 Million

RESIDENTIAL SERVICES

Incompass operates 22 residential homes across the region that are staffed 24/7. Each home is a vibrant community where residents are supported to live as independently as possible.







Highlights

- **Residential Community Events:** New initiatives creating more opportunities for connection, engagement, and shared experiences.
- **Resident Success:** Individuals celebrated meaningful successes at home and in the community.
- **Expanded Clinical Support:** Welcomed BCBA Ekaterina, Behavior Specialist Binta, and Mental Health Clinician Grant to strengthen residential supports.

Throughout FY26, our residential programs continued to evolve through new initiatives, home improvements, and expanded opportunities for community involvement. From personal milestones to memorable experiences, the year reflected our commitment to empowering individuals to live meaningful lives with greater independence, connection, and choice.



Welcoming DDS Leadership: Incompass welcomed DDS Commissioner Sarah Peterson and her leadership team to our medically complex respite home, showcasing the personalized supports provided to individuals and families across the Commonwealth.

PROGRAMS

We continue to grow enrollment in our day programs and deepen our engagement with our families and caregivers. From clinical support to caregiver assistance, Care Champions are making a difference.







Highlights

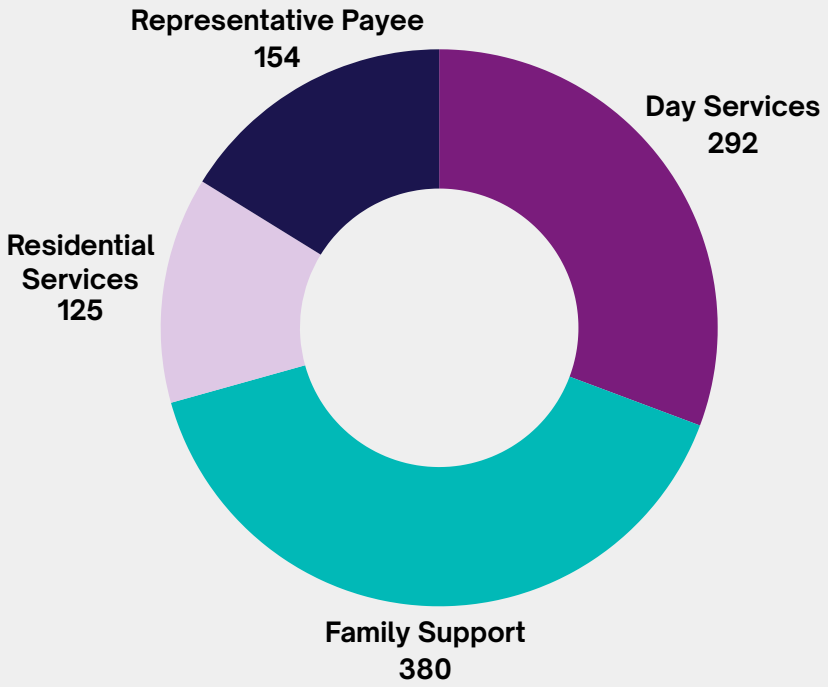
- **New & Renewed Contracts Awarded:**
  - **Supported Collaborative Living & Independent Living Supports:** A new DDS contract expands opportunities for individuals to live more independently with personalized supports in their communities.
  - **Safe Minds Community Center:** Continued as the Northeast Region's Brain Injury Community Center, providing connection and community-based supports for individuals with brain injuries.
  - **Transitional Assistance Services:** Continued providing critical supports for individuals during periods of transition.
  - **DESE/DDS Program:** Continued supports for children and young adults and their families through individualized, community-based services.



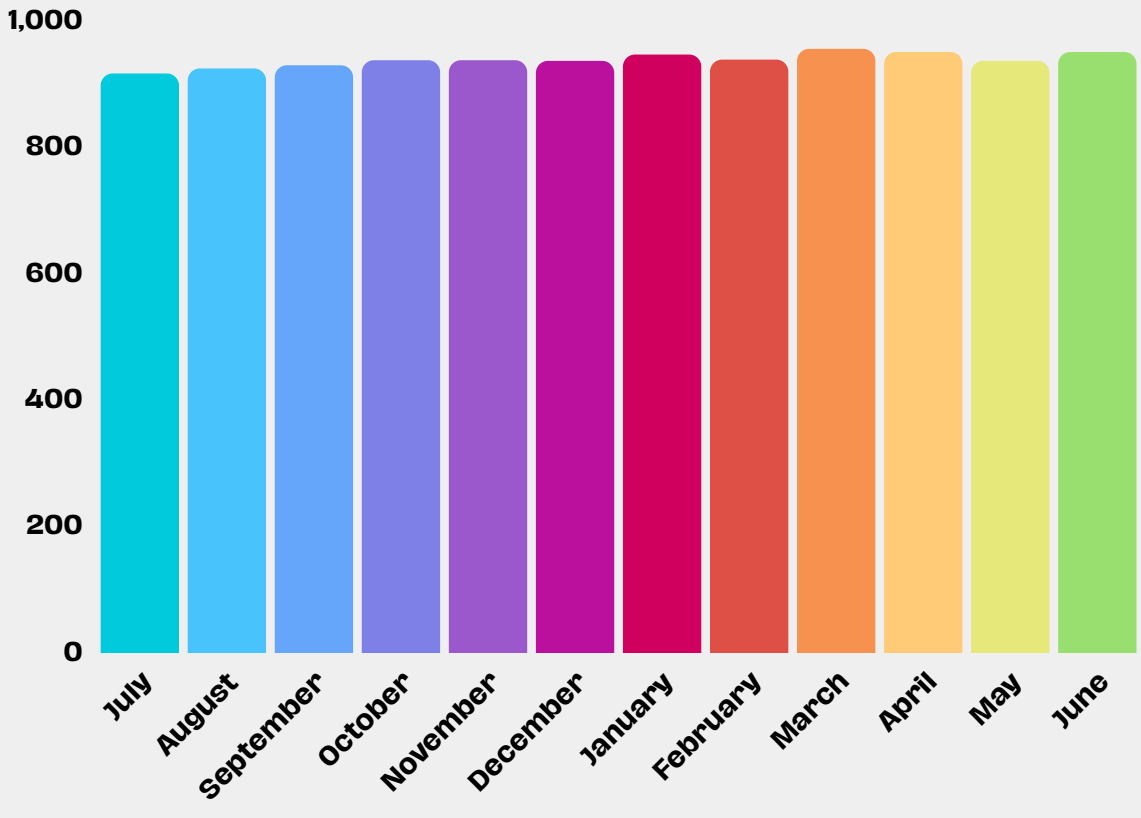
- **Motivity Launch:** Implemented Motivity software to strengthen data collection, performance tracking, and program outcomes.
- **CBDS Move:** Successfully transitioned CBDS to its new space at Omni Way.
- **iQUIC Launch:** Launched iQUIC to support quality and continuous improvement.
- **Day Program:** Continued success achieving improved or consistent support rates through the new MassHealth SNA process.
- **Celebrating Creativity and Connection:** From Incompass Got Talent and art shows to cultural celebrations and community events, Day Hab participants enjoyed opportunities to express themselves, build friendships, and celebrate their talents.
- **CBDS/Employment:** A front desk employment opportunity supported skill-building, increased independence, and valuable workplace experience.
- **Employment/TREE:** Partnered with Charmed Science to create new employment opportunities.
- **Giving Back Through Safe Minds:** Safe Minds Community Center partnered with Epilepsy Foundation New England on a clothing and textile donation initiative, creating new opportunities to give back to the community.

PROGRAMS BY THE NUMBERS

Attendance by Program
(At the conclusion of FY26)



FY26 # of Persons Served
(Per month)





COMMUNITY

Community is where connection, independence, and belonging come to life. Throughout FY26, individuals explored new places, celebrated traditions, built friendships, tried new experiences, and participated in the communities around them.

Explore Peabody Essex Museum · Museum of Fine Arts · New England Aquarium · Museum of Science · King Tut Exhibit

Experience Bowling · Movies · Fashion Show · Mini Golf

Get Outside Bruce Freeman Rail Trail · Salisbury Beach · York's Wild Kingdom · Boothbay Harbor · Kimball Farm

Celebrate Lowell Hispanic & Latinx Fest · Good Neighbor Day BBQ · Lowell Folk Festival













COMMUNITY

Community engagement remains a key priority at Incompass. Through programs like CBDS and Employment Services, along with the active involvement of our Care Champions, we continued to strengthen our presence and build meaningful connections across Greater Lowell and Greater Lawrence.

Highlights



- **Exploring Innovation with Geminai:** Through four visits with Geminai, individuals in CBDS and TREE explored cutting-edge hologram technology, created their own holograms, and experienced technology that translated their presentations into different languages.

- **Arts, Culture & Exploration:** Individuals across CBDS, TREE, and Residential expanded their community experiences with 12 visits to the Museum of Fine Arts through its Access program, two visits to the Peabody Essex Museum, and trips to the New England Aquarium and Museum of Science - with grant funding secured to support Museum of Science admission.



- **Connecting with First Responders:** Incompass strengthened relationships with the Chelmsford, Dracut, and Billerica Police and Fire Departments through station tours, Touch-a-Truck experiences, K9 meet-and-greets, and appreciation gifts created in partnership with Old Mill House Coffee.

- **Career Exploration in the Community:** Individuals explored employment opportunities firsthand through a career exploration tour at CopyPro, while Incompass also partnered with The Possible Zone for a career tour and panel discussion supporting high school students in learning about careers in human services.

We partnered with local businesses and organizations to bring new experiences and opportunities to the individuals we support, both at Omni Way and out in the community.



MFA
Peabody Essex Museum
CopyPro
Geminai
The Possible Zone
Workers Credit Union
Northern Bank
Old Mill House Coffee
National Grid
CIL
Stoneham Bank
Integris
AAFCPAs
Motivity
Salem Five Bank
Grossman Marketing
Tarrytown
Curtis Strategy
Philadelphia Insurance
Lowell Five Bank
Flagship Printing
Howden
Starkweather & Shepley
Stirling Brandworks
Shawsheen Air Services
LicenseFortress
Eastern Bank
Decibel Media





ADVOCACY IN ACTION

Elevating Individual Voices: An individual supported through Shared Living spoke at a statewide ADDP event about the importance of community-based supports. During the event, he shared his dream of becoming a firefighter, inspiring a special surprise from the Boston Fire Department - a sweatshirt celebrating his aspirations!





Advocating for Change: Incompass leaders and Care Champions brought their voices to the Massachusetts State House and Washington, D.C., engaging with policymakers to advance awareness and support for individuals with disabilities, their families, and caregivers.











The Annual Holiday Party at Lenzi's brought together 250 individuals and families/caregivers for a festive celebration, made possible by the generous support of our sponsors!











CARE CHAMPIONS

Incompass is powered by our Care Champions and our culture. This year was no different, as our team was sought after for their expertise across the industry. We welcomed many more Care Champions to our agency and celebrated them too!







Highlights

- **National Recognition from AAIDD:** Incompass leaders were recognized at the American Association on Intellectual and Developmental Disabilities (AAIDD) 150th Annual Meeting for their leadership, advocacy, and service to the field.
  - **Jean Phelps, CEO,** received the 2026 Service to the Association Award and the Sesqui Award for Advocacy.
  - **Michael Bloom, Chief Strategy & Innovation Officer,** received the 2026 Sesqui Award in Service.

- **Thought Leadership:** Incompass leaders shared their expertise on national stages throughout FY26. Michael Bloom presented alongside CIL at ANCOR Connect '26, earning a Top 3 session ranking and an invitation to the conference's "Greatest Hits" Webinar Series. CEO Jean Phelps joined Curtis Strategy at the NCE Summer Leadership Institute to present on sustainable leadership, navigating change, and strengthening organizational culture.

- **Specialized Training:** Mental Health Clinician Grant completed Elevatus Training in comprehensive sexuality education and healthy relationships for people with intellectual and developmental disabilities.









DSP Week: We celebrated our incredible Direct Support Professionals during DSP Recognition Week with this year's theme, "Leading with Heart." Throughout the week, we recognized the dedication and impact of our DSPs with a special appreciation breakfast, DSP spotlights, daily cash raffles, and new Incompass windbreakers. It was a week dedicated to celebrating the Care Champions who bring our mission to life each and every day.

Promoted Care Champions: Our culture of growth emphasizes career advancement, and this past year, we promoted 12 Care Champions!

Care Champions ACT: Incompass launched Care Champions ACT, a leadership development program designed to strengthen communication, coaching, collaboration, and leadership skills across the organization.

Quality & Compliance: Strengthened our Quality & Compliance department to streamline policies, processes, and procedures while creating a smoother, more welcoming onboarding experience for the individuals and families we support.

Expanded NEO: Expanded New Employee Orientation to strengthen onboarding and staff preparedness.

Town Hall Forum: Held our first hybrid all-staff Care Champion Forum, bringing Care Champions together to hear organizational updates and ask questions directly of the leadership team.

Survey Says!: Our annual employee engagement survey had a nearly 100% participation rate and an engagement score of 8.4/10!

HR BY THE NUMBERS

New FY26 Hires
169

# of Staff
704

Vacancy Rate
3.8%

Avg. Staff Tenure
6.3 Years

Employee Engagement Score
8.4/10

18%
Turnover Rate



FUNDRAISING & PHILANTHROPY



We rely on the support of our community to help us deliver the high-quality programs and supports that our individuals deserve. We were pleased to see strong support from our community in FY26, highlighted by our Kentucky Derby Fundraiser!

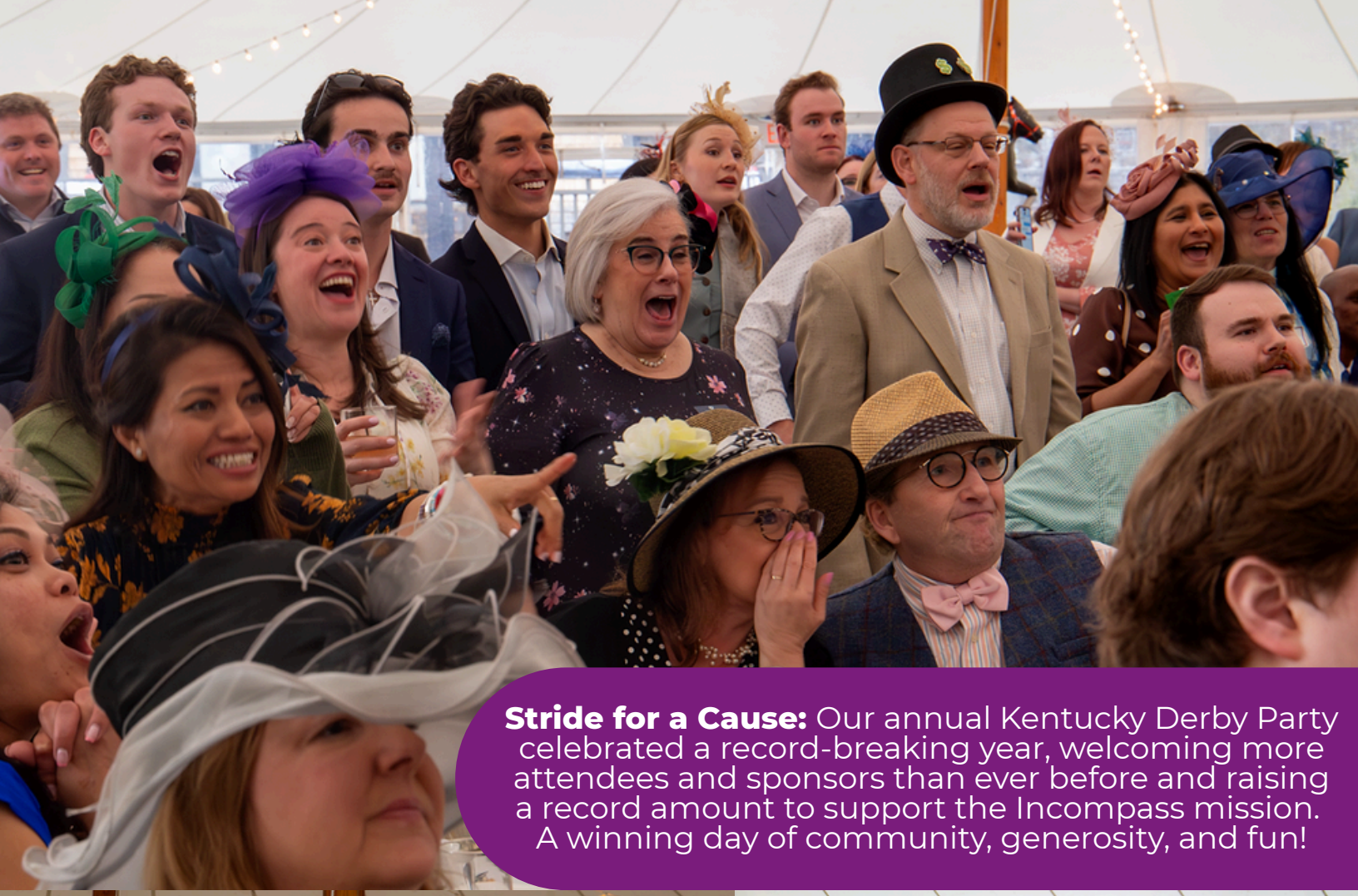
Total Donors
172
↑ 13.9%

New Donors
57
↑ 50%

Foundation & Corporate Donors
35
↑ 94.4%

Highlights

- **Stride for a Cause:** Celebrated a record-breaking year for our annual Kentucky Derby fundraiser, with 25 sponsors and more than $44,000 in revenue.
- **Year-End Giving:** Raised more than $12,000 through Give for Good, bringing together donors and community partners in support of the Incompass mission.
- **Grants & Strategic Funding:** Significantly expanded our grant activity, while continuing to build relationships with corporate and foundation partners.
- **Growing Our Community of Support:** Expanded philanthropic engagement with 57 new donors and nearly doubled the number of corporate and foundation donors.



Stride for a Cause: Our annual Kentucky Derby Party celebrated a record-breaking year, welcoming more attendees and sponsors than ever before and raising a record amount to support the Incompass mission. A winning day of community, generosity, and fun!







LOOKING AHEAD

As we enter Fiscal Year 2027, Incompass Human Services remains focused on strategic growth, operational excellence, an engaged workforce, and creating meaningful opportunities for the people we support.

Priorities for FY27

- Drive strategic growth by expanding enrollment, employment opportunities, and service capacity across key programs.
- Invest in our Care Champions through meaningful recognition, professional development, specialized training, and increased staff engagement.
- Modernize systems and processes to improve efficiency, strengthen quality, and support better service delivery.
- Expand access and opportunity through new initiatives, an accessible new website, and programming that reflects the goals, interests, and needs of the people we support.



incompass™
HUMAN SERVICES
an affiliated chapter of The Arc.



4 Omni Way, Chelmsford, MA 01824

978-349-3000

NEW ENGLAND HUMAN SERVICES COLLABORATIVE
NEHSCO

Founding affiliate

incompasshs.org