

***Habilitation Assistance Corporation***  
***2008***  
***Annual Report***

The following information was reported to our Board of Directors, Advisory Council, Central Work Group Committee Members and Personnel. This information is also generally reported via our agency website, [www.habilitationassistance.com](http://www.habilitationassistance.com).

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### **Outcome Measurement**

The following section is a summary of established outcome measures to be shared with stakeholders and utilized in organizational planning efforts. These measures are designed to evaluate the efficiency, effectiveness, and potential need for supports. In addition, they gauge the satisfaction of persons served, parents/guardians, staff and other stakeholders that work with Habilitation Assistance Corporation to reach our mission of supporting individuals in realizing their personal visions.

The format of the following section includes 11 separate objectives relating to the agency's evaluation: 1) maximizing customer satisfaction, 2) maximizing customer input, 3) maximizing customer independence (effectiveness), and 4) maintaining agency viability (efficiency). A summary will follow highlighting recommendations and areas of interest occurring during the reporting period that may be unique. The first section measures the satisfaction of members, stakeholders, and funding sources. The second section measures member participation on social events, advisory and member committees as well as member involvement in choosing the staff providing services. The third section measures objective and goal attainment of our members. The fourth section measures staff retainment and utilization of capacity of programs. Each section includes a description of accomplishments during this period and action steps, or recommendations to be accomplished during the next reporting period.

The results of the organization outcome measurement system will be reviewed and incorporated into the development of the agency's accessibility, risk management, strategic, technology, corporate compliance and marketing plans as well as long range planning for the corporation.

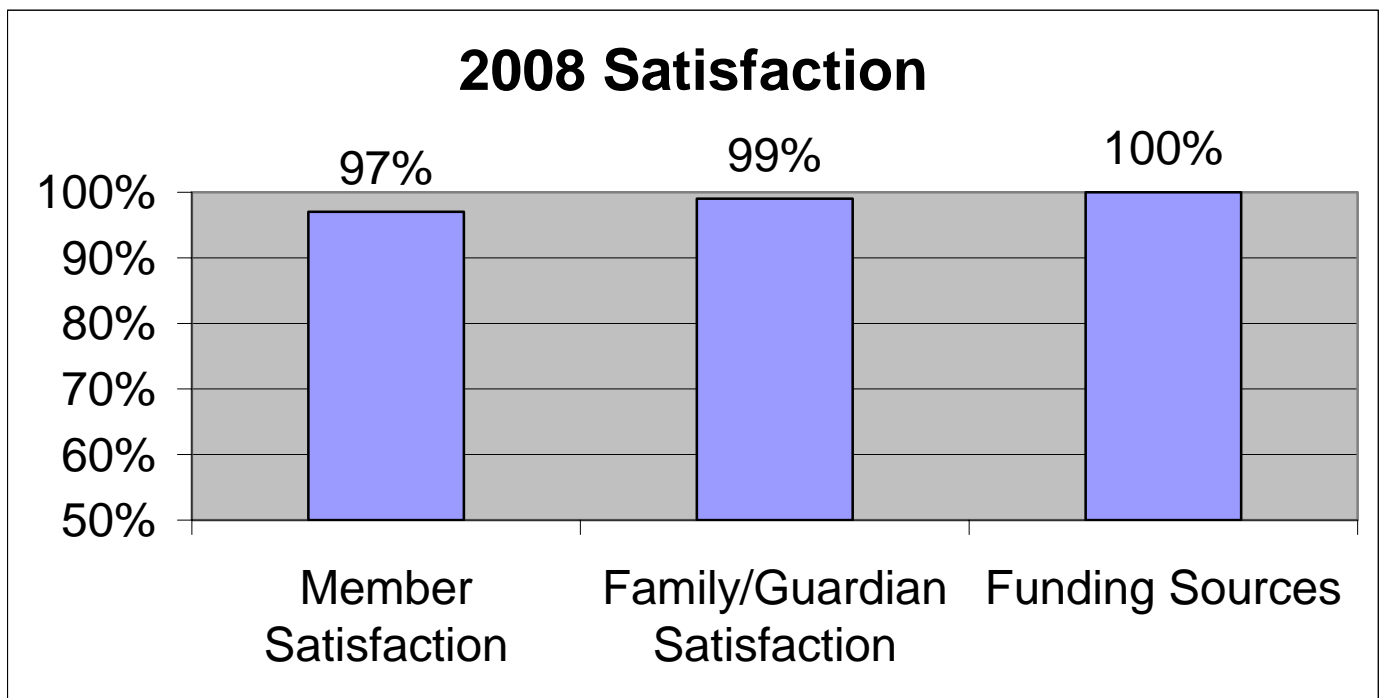
The reporting period of this document is from July 1, 2007, through June 30, 2008.

Objective 1: Maximize Customer Satisfaction

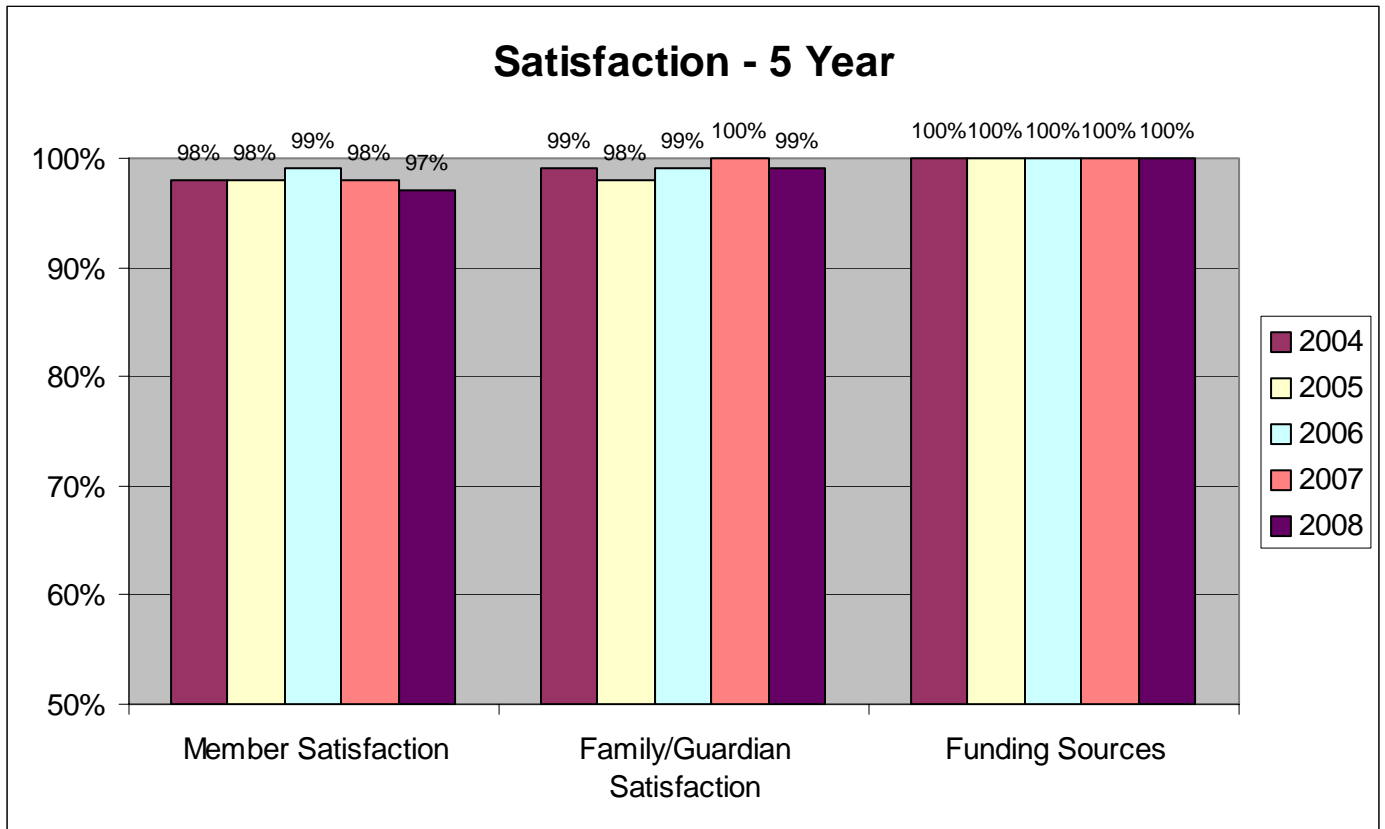
Our first indicator is that 85% of our members will be satisfied with the services we provide. We surveyed 189 members receiving day habilitation services through our Access Centers, 79 members receiving homemaker services through our Home Care Division, and 12 consumers receiving supported living services, also through our Home Care Division. The response rate was 83%. Of the responses received, 97% stated that they were satisfied with the services provided. Access Center members responded a 98% satisfaction, Supported Living members responded with a 100% satisfaction, and Homemaker members responded with 95% satisfaction. This 97% combined satisfaction rate clearly surpasses our expected target of 85%. This rate remains consistent with the previous 3 years being 99% in 2007, 99% in 2006, and 98% in 2005.

Our second indicator is that 85% of family members and guardians of our members will be satisfied with the services we provide. We surveyed 383 families and guardians of our Access Center and Nursing Home members, and 281 families and guardians of our Access Express riders and 32% responded. Out of 123 responses received, 122 reported that they were satisfied with the services provided. This is a 99% satisfaction rate, which also remains consistent with the previous 3 years being 100% in 2007, 99% in 2006, and 98% in 2005.

Our third indicator is that 85% of funding and referral sources will be satisfied with our services. We surveyed 100 funding and referral sources, which included DMR supervisors and service coordinators, DMA manager of day habilitation, Mass. Commission for the Blind case workers, MRC staff in supported living and homemaking division in addition to other individuals who have referred members to our services. The response rate in this category was 16%. Out of 16 responses received, all reported that they were satisfied with the services provided. This is a 100% satisfaction rate, which also remains consistent with the previous 3 years, being 100% in 2007, 2006 and 2005.



In review of the data received for fiscal year 2008, we are happy to report that satisfaction with the services that Habilitation Assistance Corporation provided is extremely high. The Executive Director and Program Directors personally review these surveys and respond to any issues and/or suggestions in addition to responding to issues that come to their attention on a daily basis. Although data has been consistently extremely high and surpassed our targets in this area, we feel that these goals should continue to be carefully monitored. All existing systems, procedures, and communication will remain in place to ensure that Habilitation Assistance Corporation will continue to effectively maximize customer satisfaction.

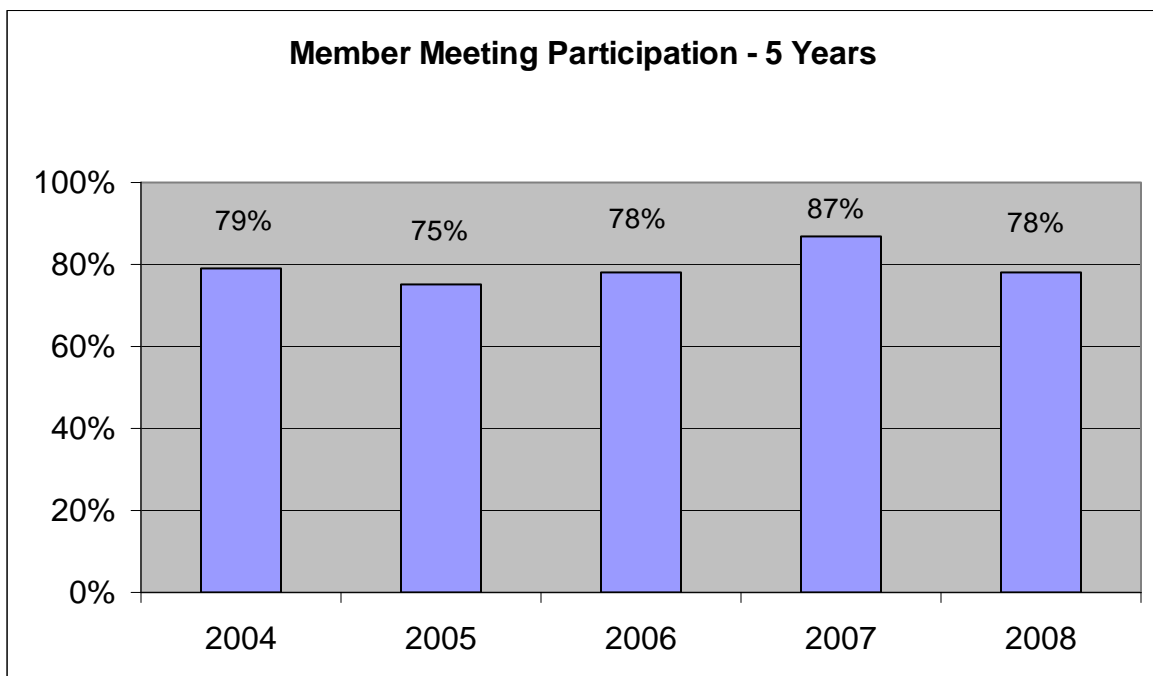


Objective 2: Maximize Customer Input

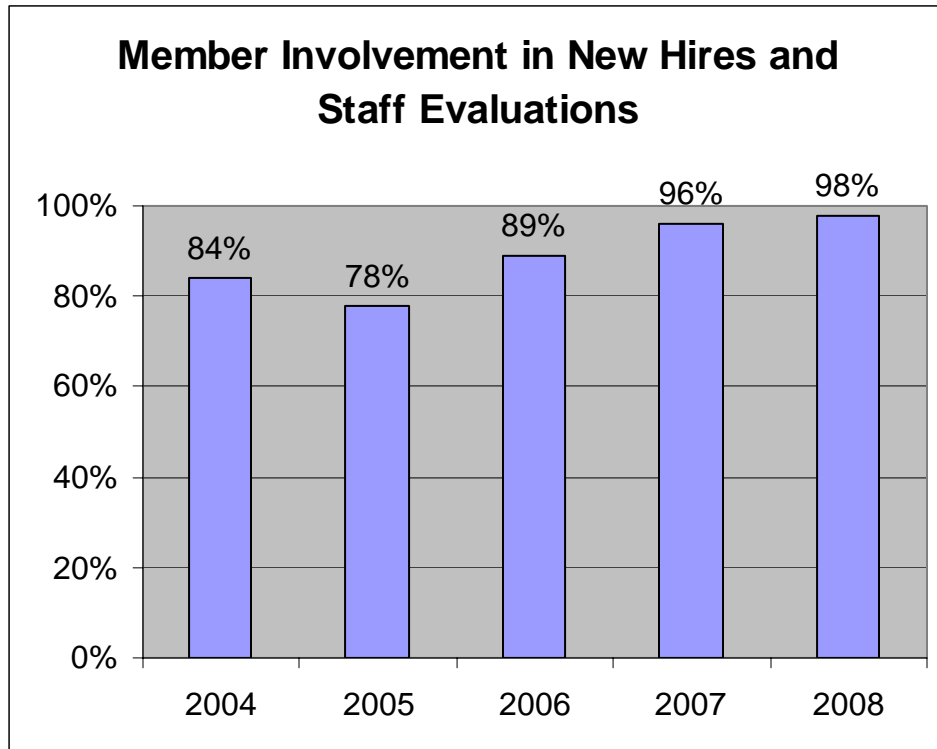
The first indicator is that 10% of participants at our Access Centers will participate on a Social Events Committee, which is a member driven committee within each program that proposes and plans events within the programs and in the community. In 2008, 16% of our Access Center members participated on a Social Events Committee. This indicator includes both participation on the agency-wide committee in addition to sub-committees within the Access Centers. This exceeds our expected target of 10%. We will continue working hard to afford our members opportunities to direct the activities they participate in.

The second indicator is that 20% of our Advisory Council will consist of persons served. The Advisory Council is a board consisting of employees, program members, community representatives, and families of our members, which advises the Executive Director concerning needs of our members, ways to better integrate our programs into the life of the community, marketing in the community, setting long and short term goals for the agency and feedback on the financial status of the organization. In 2008, persons served represented 23% of our Advisory Council. This exceeds our target for 2008. Member representatives from our Hyannis, Plymouth and Upper Cape Access Centers are currently participating on this Council.

The third indicator is that 85% of program participants will participate in Member Meetings. Member meeting is a forum where members can voice any news, suggestions or concerns they may be having. In 2008, 78% of members at the Access Centers participated in member meetings, which are held on at least a monthly basis. We fell short of our target 3 of 4 quarters and annually in this indicator. The Mid-Cape Access Center did not report any meetings held during 2<sup>nd</sup> quarter, and Braintree, Upper Cape and Mid-Cape all reported attendance at schedule meetings lower than target for several months during the year. It is difficult to control attendance at these meetings due to illness, absence and scheduling conflicts, but we will more closely monitor for 2009.



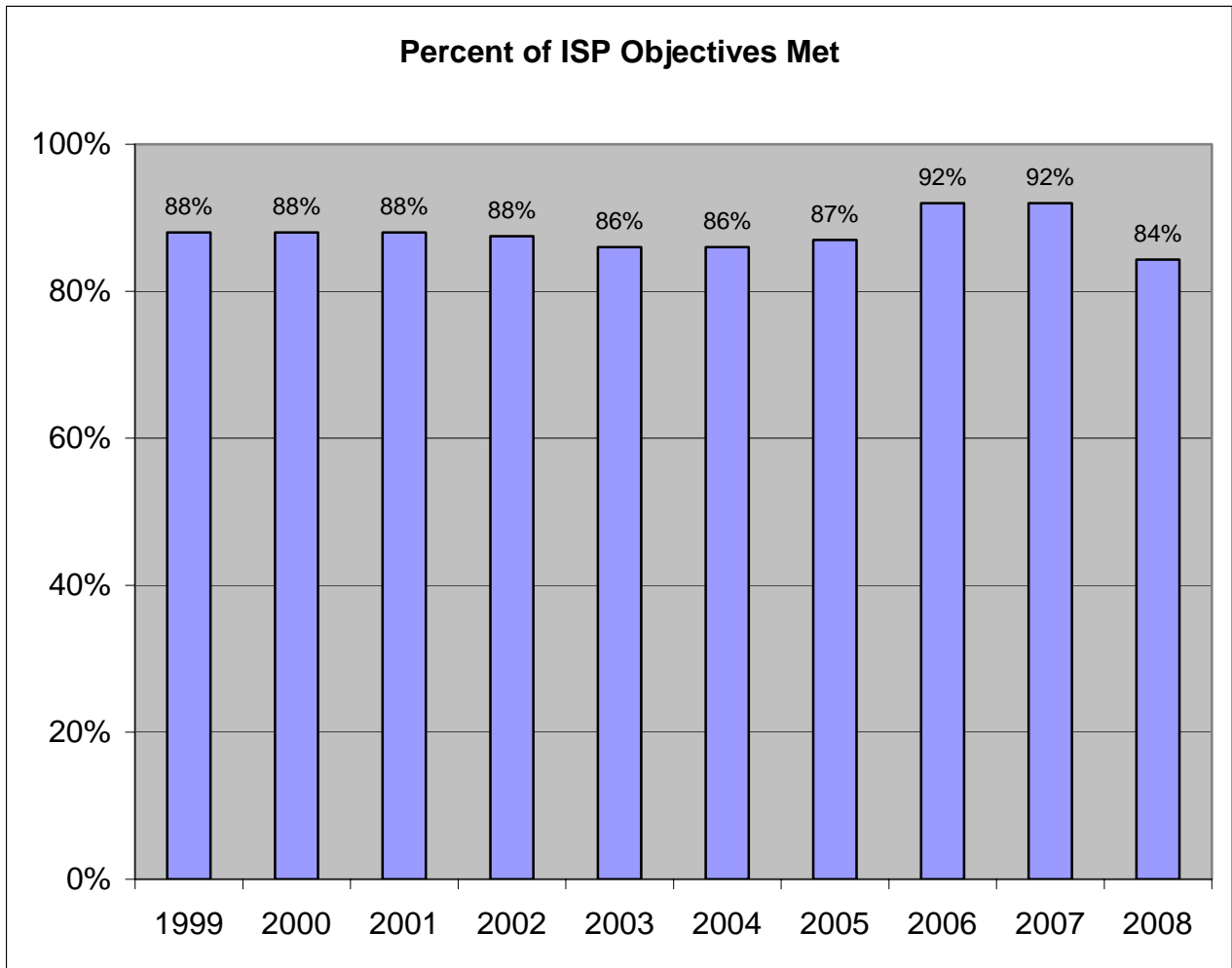
The fourth indicator is that 80% of staff that are hired and evaluated will have had a member involved in the process. In 2008, of 51 new hires and staff evaluations, 50 had the involvement of a program participant. This data reports 99% in comparison to our target of 80%. The Program Directors should also be commended in this area, as their focus on asking members for input with regard to their staff has been successful. We will continue that focus for the upcoming year.



The agency provides a number of avenues of customer input on a daily basis. Usually, the most important input occurs on an informal day-to day basis at the service level, which is sometimes difficult to document and measure. Our dedicated staff continually listen to the needs and requests of our members and act on them.

Objective 3: Maximize Customer Independence

The first indicator is that our Access Center members will attain 80% of their identified objectives. In 2007, our members met 776 out of 921 objectives. This is an 84% attainment rate and surpassed our target for this year. We remain consistent in this area, with members attaining well above 80% of their identified objectives over the past ten years.

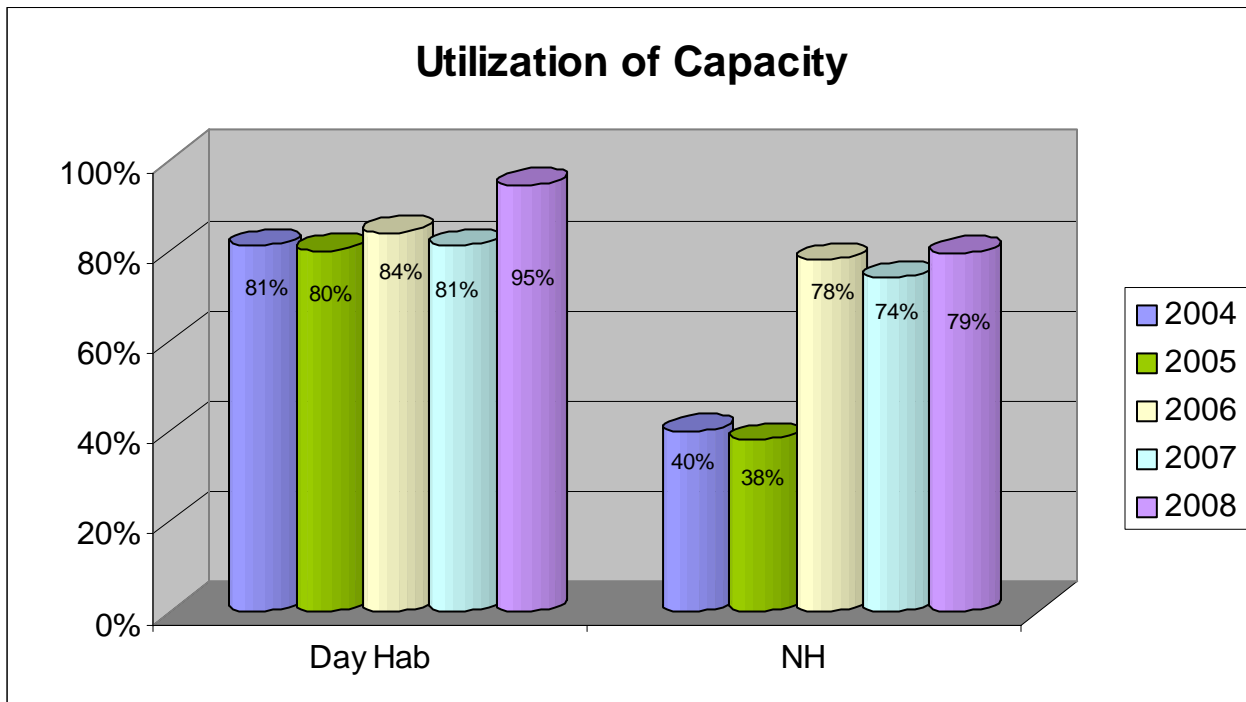


In review of the data collected in 2008, Habilitation Assistance Corporation has significantly reached its objective in helping our members attain their goals towards more independence. Members and staff are commended for their efforts in working together to achieve such success. We will continue to aggressively pursue all avenues to maximize member independence.

Objective 4: Maintain Agency Viability

The first indicator is that the agency retains 75% of its full time staff. 2008 showed a 98% staff retention rate, surpassing our target. Clearly, this is an extremely high retention rate, especially in the human services field. The agency works hard to increase salaries and benefits whenever possible, as well as provide a high level of training opportunities to allow for both personal and professional growth and enhancement. This year has brought many training opportunities for our staff as well as other health care staff in the community with the continuation of our ECCLI career ladder training program. Our agency has a twenty-four year history of not only providing quality caring for its members but strives to offer the same for its staff. Our staff are the most valuable agency resource and are looked to for shared management participation. We believe and survey results have shown that the participatory management opportunity is a significant employment retention factor, affording our staff the opportunity to participate in the direction of the agency.

The second indicator is that the Access Center members will attend the programs 75% of the time. In 2008, the Access Centers resulted in 95% utilization of their capacity. Off-site at the nursing facilities, utilization was 79% of capacity. Our target for 2008 was surpassed in both service areas, although we continue to see an increased termination rate, especially in the nursing homes due to the age and fragility of those members in particular. Program Directors have done an excellent job of pursuing referrals with our funding sources, and will continue to do so. This utilization indicator is used as a revenue check and provides us the information to produce accurate budgets and forecasting.



In review of the data collected in 2008, the agency is maintaining its viability through its efforts in retaining staff and projecting attendance.

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**PERSONS SERVED DEMOGRAPHICS**

Our Braintree Access Center served 77 members in 2008. 58 were served at the access center and 19 at nursing facilities. The average age of our Braintree members was 54 for members served at the access centers and 74 for members served at nursing homes. For all members at Braintree, 25 were over the age of 65 and 2 were under the age of 35 and the average severity profile score was 61, placing in the moderate need level category.

At our Mid-Cape and Islands Center, we served 71 members, 66 onsite and 5 at nursing homes. Average age of access center members was 44 and for nursing home members, 72. For all members at Hyannis, 9 were over 65 and 16 were under 35 and average severity profile score was 56, also falling into the moderate need category.

At the Plymouth Access Center, we served 79 members in total, 70 onsite and 9 at nursing homes. Average age of access center members was 50 and nursing home members was 54. For all Plymouth members, 11 were over 65 and 8 were under 35 and average severity profile score was 80, falling in the high need level category.

At our Upper Cape Access Center, we served 69 members in total, 64 member onsite and 5 in nursing homes. Average age of access center members was 47 and for nursing home members, 70. For all Upper Cape members, 7 were over 65 and 11 were under 35 and average severity profile score was 67, falling in the moderate need level range.

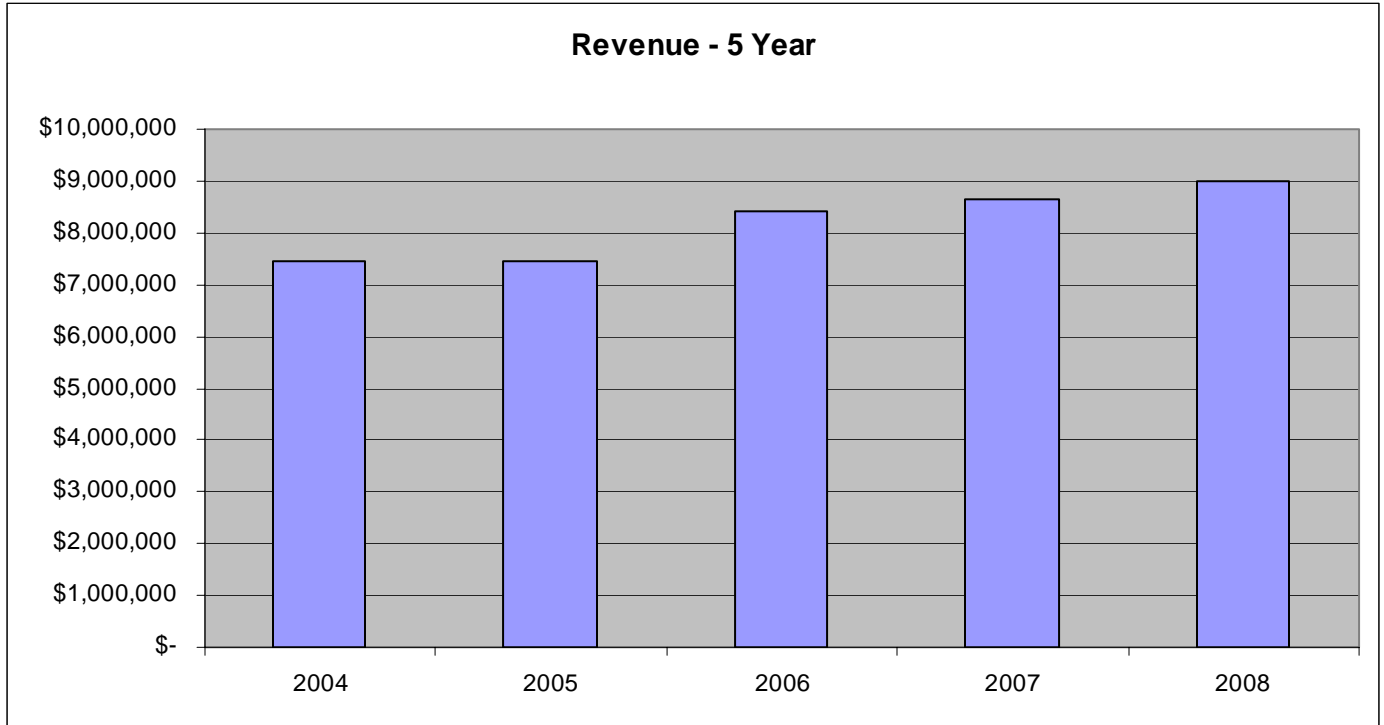
Our member demographics at each center clearly vary and the Program Directors have done a good job of tailoring services offered to meet the needs of those members, as evidenced in consumer feedback.

**CUSTOMER SATISFACTION POST SERVICE FOLLOW UP**

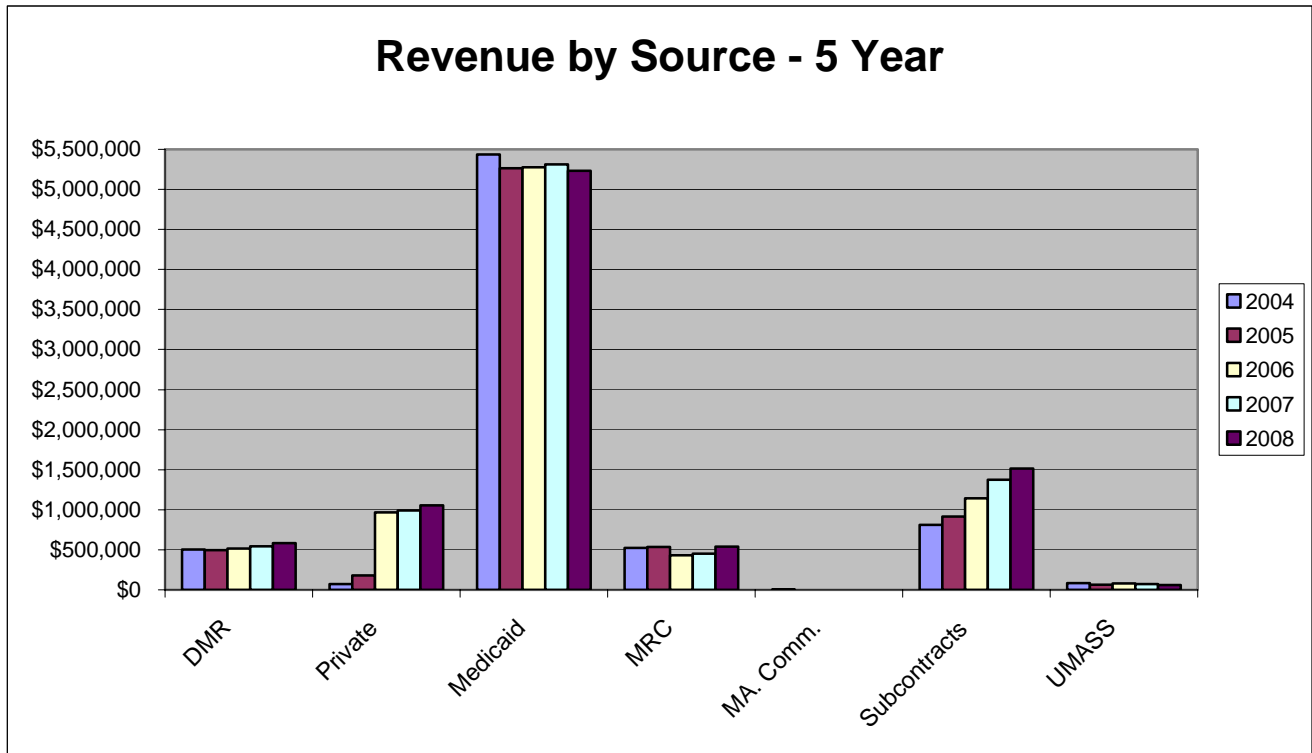
When a member is discharged from the access center, a letter is sent confirming discharge along with a satisfaction and follow up survey. one member who was discharged during fiscal year 2008 returned our satisfaction and follow up survey. This member indicated satisfaction with his new placement, which was to stay at his group home.

Revenue

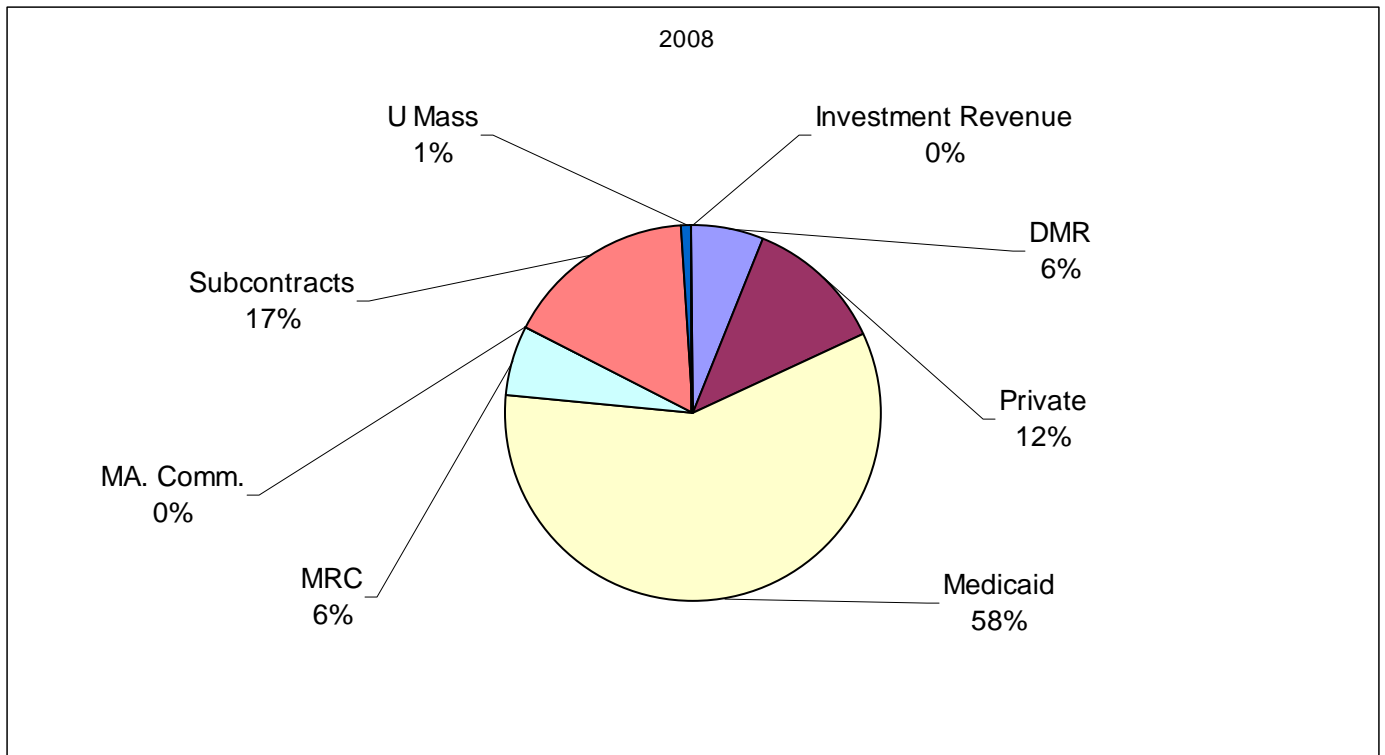
Habilitation Assistance had been able to maintain steady revenue increases between 2004 and 2008. In 2006, the agency was awarded a materials delivery contract with the Southeastern Massachusetts Library Services, which increased our revenue despite continued lowered Medicaid rates in our other service areas. In 2007 we were able to negotiate a higher rate with the library contract to offset increasing fuel and vehicle costs. Unfortunately we were not re-awarded the contract for the upcoming fiscal 2009 year, but we were able to renegotiate our transportation contracts for rate increases that helped to offset the loss of library contract.



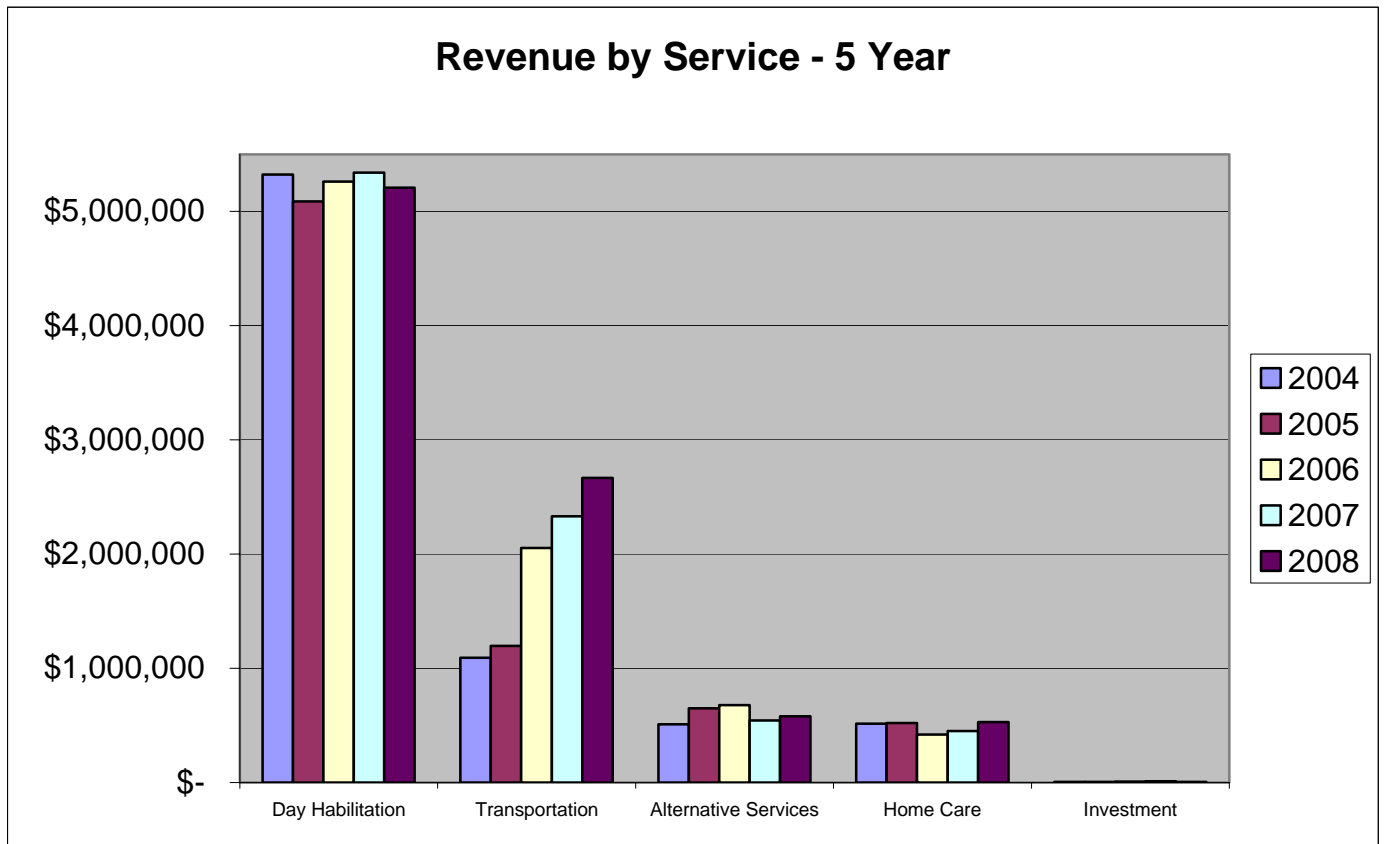
The next graph below shows the revenue by source for the last five years. As you can see, Medicaid remains by far our largest center and has decreased by 2%. DMR increased, by about 8%, this year. Private revenue has increased 6% and again Mass. Commission for the Blind returned no revenue for us this year, as we did no contract work for them. Subcontracts increased by about 10% because of increased transportation services and the SEMLS library book contract. UMASS decreased again, by 14% this year due to nursing home member terminations and illness. We again this year were successful in working toward our goal of becoming less dependent on Medicaid as the primary source of our revenue. We will work to continue in 2009 on decreasing our dependence on any one source of revenue.



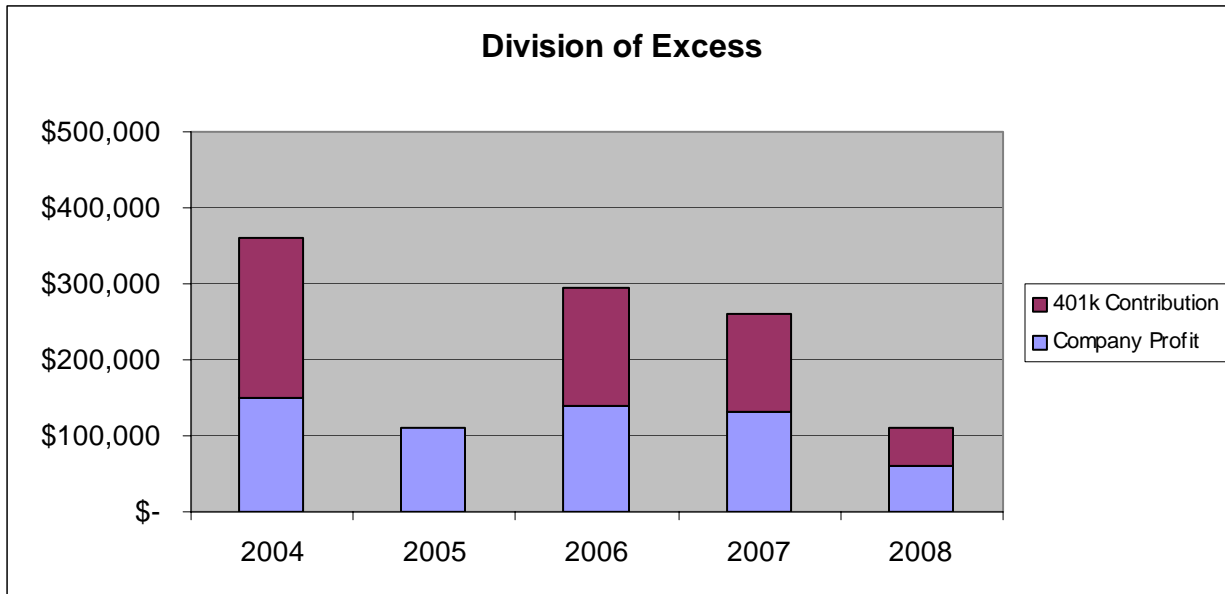
Here is another view of the revenue by source for 2008, showing Medicaid as being 58% of our total revenue, subcontract 17%, Mass. Commission for the Blind, 0%, Department of Mental Retardation 6%, Mass. Rehabilitation Commission 6%, UMASS 1%, private, 12%, and investment revenue being less than 1%. Study shows that this year Medicaid's part of our revenue has decreased by 3%, and MRC, Private and Subcontracts have all increased by 1%. Other sources of revenue have stayed consistent with last year. Although we have had success in the past in moving toward less dependency on any one revenue source, we will still need to focus on expanding our service area and research other funding sources for the agency.



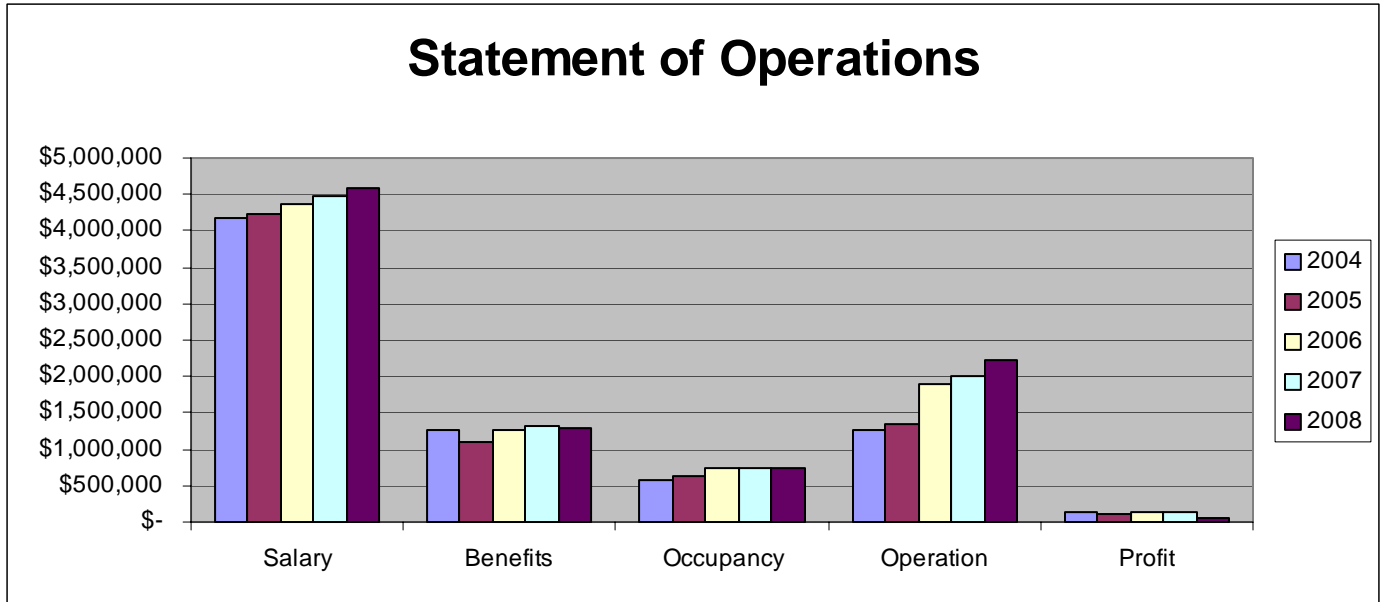
The graph below shows our revenue by type of service offered at Habilitation Assistance Corporation. We can see here that our day habilitation revenue decreased in 2005 with Medicaid rate cuts, but with the hard work of the directors in requesting and processing new referrals, we were able to bring that revenue back up in 2006 and 2007. In 2008 we saw a decrease in day habilitation revenue due to a general decrease of census and utilization. Transportation revenue increased in 2006 when we were awarded the Southeastern Massachusetts Library System contract to deliver library materials between member libraries and again in 2007 and 2008 relating to renegotiating that contract as well as an increased request for our transportation services. State contracts under Alternative Service decreased in 2007 year because DMR reduced contract amounts in response to state budget cutbacks, and there was a slight increase in 2008 due to the addition of salary reserve revenue increases. The loss of several homecare consumers resulted in a decrease in Homecare revenue in 2006, but, also due to the hard work of the directors of the homemaker and supported living programs, increased in 2007 and again in 2008.



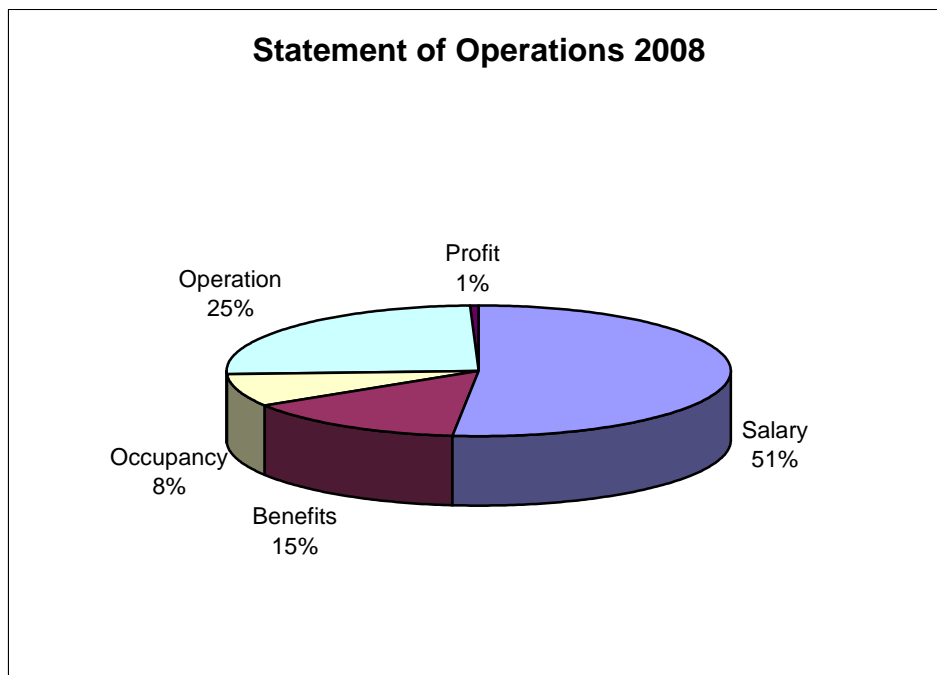
This graph shows how our excess resources have been shared between staff and the agency. In the past, the agency has attempted to use as a guide an equal sharing of excess between itself and all those employees who provided 1,000 hours of service or more to the company. We have been fortunate this year to be able to contribute again to the agency's 401(k) plan. The agency contributed \$50,630 to the employee 401(k) plan and retained \$59,673 as profit for the year 2008.



This chart shows the other side of revenue, our expenses. Expenses are divided into five major categories -- salaries, benefits, occupancy, program operation and profit. In 2008, profit was the only area that saw a substantial decrease from last year, with a 54.25% decrease. Benefits and occupancy also saw a slight decrease of between 2% and 1.5% respectively. All other expense areas slightly increased for 2008. Salary increased 2.46% and operation increased 11.25%.



This chart shows the breakout or percentage of the agency's resources and how they were allocated. Salaries and benefits continue to be the largest piece of the pie and accounted for 66% of the agency's resources.



Here we will find some of the agency's accomplishments during the past year. Some of these were goals that were set last year and some were unplanned successes.

Members participated in the community in the following ways:

- Volunteering opportunities at MSPCA, Goodwill, Thornton Burgess Society, Cape Cod Hospital, Smithfield Farm (horse care and riding lessons); Meals on Wheels, Elder Services/Senior Center, Jenny Grist Mill, Green Briar Nature Center, Redemption Centers, Library, Recreation Centers, Cape Cod Community College, Food Pantry, Woods Hole Oceanographic Institute, Bourne Manor (Flower Power), Cape Heritage Nursing Home (Flower Power), NOAA, Waquoit Bay Estuary
- Community experiences at Libraries, Food Stores, Restaurants, YMCA, Picture Lake, Hardware Stores, Four Ponds, Bowling, Nature Rides and Walks, Malls, Cape Cod Canal, Garden Centers, Scallop Festival, Bourne Scenic Park, Fishing Trips, Pumpkin Patches, Pond Meadow Park, Banks, Buttonwood Zoo, Citizens Bank Art Show, King Richards Faire, Quisset Harbor, Exploring Cape Cod, Coffee Shops, Ice Skating, Hiking, Cape Cod Community College, "Scooper Bowl" at City Hall Plaza in Boston, Sunset Lake, Tremont Nail Factory, Memorial Hall in Plymouth to see Red Sox Championship Trophy, Picnics, Visiting Other Access Centers, Movie Theaters, Boston's Flower Show, Spring Fling at Radisson Plymouth, Special Olympics at Otis Air Force Base, Plymouth Waterfront, Beach, and Stores such as TJ Maxx, Christmas Tree Shops, Marshall's, Michael's, Walmart, BJ's Wholesale, Home Depot, K-Mart, Dollar Store, Sears, Petco, Benny's, I-Party, Saftler's, Woof 'n Whimsy.
- Habilitation Assistance sponsored several agency/community events. In June we held our Annual Massachusetts Special Olympics Event at Otis Air Force Base. In April our annual dance, the Spring Fling, in May our "Afternoon of Music" concert and tag sale and the Shining Sea Bike Path ride were held, all benefiting Special Olympics.
- Access Centers held Independence Day Cookouts, beach parties, a Pomodoro Festival, Luaus, Field Days, Softball Tournaments, Western Day, Bowling Leagues, International Food Festival, Major League Baseball and National Football League sports watcher groups, Haunted Houses, Spa Days, Casino Day, Pen Pal and Email groups, 50's & 60's parties, Sadie Hawkins Hoedown, Camp Week, Thanksgiving Dinners at the centers with families and friends, Staff Appreciation Days, Winter holiday, New Year's, Cinco de Mayo, St. Patrick's Day, Chinese New Year, National Ice Cream month and Mardi Gras celebrations.
- The "Pocasset Café" continued to provide healthy food options for members as well as ethnic and holiday related food.
- Both our Pocasset and Hyannis programs create quarterly newsletters. "The Main Event" (Hyannis) and "The Pocasset Post" (Pocasset) are developed by members and distributed to families and the community.
- One of the other things we are especially proud of this year is the community volunteer jobs held by our members. The following is a partial list of volunteer positions held: MSPCA, Red Cross, Helping Hands for the Elderly, Goodwill, Friends of Bourne Food Pantry, Meals on Wheels, Cape Cod Community College Laboratory, JML Nursing Home, YMCA Daycare, Festival of Trees, Hyannis Skilled Care Center, Barnstable Senior Center, Centerville Public Library, Cape Cod Hospital, Thornton W. Burgess Society, Red Cross, and Greenbriar Nature Center. Our Members in Pocasset have collaborated with Smithfield Farm by offering their services helping take care of horses in exchange for riding lessons.
- Member activities included: gardening/horticulture, cooking, photography, computer/technology, holiday parties, scavenger hunts, picnics, line dancing, coffeehouses, sports

rallies, poetry, writing, music, pool tournaments, kickball, walking clubs, sewing clubs, scrapbooking,

- We continue to purchase new vehicles as needed and now have a fleet of 70 vehicles, 33 of which are wheel chair accessible and 2 buses.
- Participated in Plymouth Chamber of Commerce's Business Expo and the Provider's Council Expo in Boston
- In fiscal year 2008, our transportation department Access Express, provided more than 100,000 transports.
- We continued to expand our livery service to include wedding and special functions. We were able to coordinate transportation services and shuttles for more than a dozen weddings this year.
- We continue to focus on networking and the sharing of information. Examples of this would include our participation with the Massachusetts Day Hab Coalition, Area Training Council, Providers Meetings, Regional Steering Committee for the Workforce Development Committee, The Workforce Development Committee, the ARC, MassAging, The Department of Mental Retardation Clinical Review Committee, and The Supported Living Coalition.
- The ECCLI Career Ladder program has continued to exceed our expectations.

Committees

We want to thank and show our appreciation to all of the staff that participate on agency committees. Without these individuals and their diligent efforts, this agency would not be moving forward with the resolve, determination and support that it now enjoys. The individuals whose names have an asterisk are the chairpersons of the committee.

Advisory Council

\*Allen Eddy  
 Gerald Buckley  
 Ellen Burgio  
 Susan Conway  
 Kerri Gerety  
 Joan Grassi  
 Joe Hamilton  
 Richard Linhares  
 Mary Little  
 Donald Smith  
 Joanne Smith  
 Francis Turner  
 Joyce Turner

Case Records Committee

\*Lynda Sullivan  
 Jill Ansello  
 Pam Bailey  
 Erin Dinneen  
 Linda Dougherty  
 Laura Kolb  
 Joann Savino

Central Work Group

Mark Buguey  
 Ellen Burgio  
 Jodie Cash  
 Bob Cleary  
 Cindy DiMestico  
 Allen Eddy  
 Joyce Gifford  
 Sandy Irving  
 Jackye Josephson  
 Amy Morini  
 Jane Sottak

Health and Safety Committee

\*Mark Buguey  
Scott Adams  
Abby Brown  
Karen Boucher  
Erin Dinneen  
Kerri Gerety  
Barbara Leth  
Amy Morini  
Robert Thornton

Human Rights Committee

\*Mary Lou Blair  
Chris Bell  
Kathleen Boothroyd  
Tammy Christensen  
Andrew Cowling  
Kate Dean  
Ann M. Fay  
Jacquelyn Grimes  
Missy Lowe  
Scott McGuire  
Maira McLane, Est.  
Rita O'Neil  
Jane Polcaro  
Virginia Studley  
Joanne Peters

Quality Assurance Committee

\*Jane Sottak  
Sandra Eldridge

Social Events Committee

\*Amy Morini  
Manny Dias  
Meg Dorsey  
Diane Henn  
Jackye Josephson  
Kathy King  
Kelly Peckham

Awards

Attendance

We would like to thank those employees who demonstrate support and respect to their colleagues and our members. These employees demonstrated their dedication to the individuals we serve and to their team by being present every day, ready, willing and available to do their part. They are clearly aware that they are part of the team and as such are often called to step up and step in when the need arises. These staff members are the ones who always come through for the team. We would like to recognize these staff with a special recognition for their attendance. The criterion for this new award is:

- The employee must have 3 days or less of sick time used during the fiscal year and will receive one personal day or \$50.

Plymouth	-	Brenda Smith, Betty Cronin
Braintree	-	Doug DeCosta, Meg Dorsey
Hyannis	-	Chris Bell, Ramon Lopez, Rich Salvatore, Wayne Brown
Pocasset	-	Linda Dias, Nate Wales, Roger Levin
Transportation		Mike Eddy, Meredith Eddy, Leigh Armistead, Hugh Currier, Steve Eddy, Gary Parker, Justin Peters, David Rogers, Mitch Wilson
Homecare/CM-		Jane Sottak

Team Spirit Award

This award is to recognize the employee who can easily bend and mold to fit any situation and who steps up to the plate to do whatever it takes to get the job done, which is the key to success of any team.

This award is presented to the employee who best exemplifies the following:

- Flexibility
- Cooperation
- Willingness to Volunteer
- Adaptability
- Maintains a Positive Attitude
- Ability and Willingness to Take Initiative

The following staff have been nominated to receive this year’s team spirit award:

Plymouth	-	Mona Glass
Braintree	-	Guerlande Esteve
Pocasset	-	Rosario Beaudoin
Hyannis	-	Quincey Custer
Homecare/Case Management	-	Fran Dupuis

Employee of the Year

This award is presented to the employee that exemplifies the following:

- Is a role model as defined below:
  - Advocate for members and agency
  - Well prepared, organized, offers creative ideas and activities
  - Keeps their environment clean, neat, organized
  - Engaging, interactive and present with members and staff, attentive to both verbal and non-verbal communication from our members
  - Knows members and uses a total communication approach
  - Interactive
  - Socially appropriate in conversation and appearance
  - Caring and compassionate
  - Receptive and responsive
- Best exemplifies the agency’s mission
- Takes initiative
- Exhibits a professional demeanor
- Presents a positive attitude
- Has demonstrated high moral conduct and integrity
- Is a strong leader
- Has demonstrated exemplary skills in problem solving and providing creative solutions
- Shows respect for coworkers, members and agency resources
- Vigilant regarding issues of safety

Presented to:

Plymouth	-	EJ Jenkins
Braintree	-	Anita O’Connor
Hyannis	-	Bob Ryan
Pocasset	-	Caroline Glover
Homecare/Case Management	-	Pam McDonald

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Most Valuable Colleague

The most valuable colleague is presented to the staff member at each access center site who best represents the highest standards set forth by their co-workers. These are the individuals who were voted the Most Valuable Colleague of their Center. Each of these individuals was awarded with 2 extra personal days to be used this coming year.

*Braintree Access Center – Joanne Peters  
Plymouth Access Center – Jackye Josephson  
Upper Cape Access Center – Missy Lowe  
Hyannis Access Center – Sara Barrows  
Homemaker Services – Leonor Melo*

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Years of Service Awards

The following employees are being recognized for their years of full-time service with Habilitation Assistance Corp.

- 3 Years
  - Joyce Gifford
  - Kathleen LaVoie
  - Sara Barrows
  - Bob Ryan
  - Cheryl Gray
  - Manny Dias
  - Bob Ford
  - Judy Noonan (from 2007)
  - Mike Eddy
  - Meredith Eddy
  - Nicole Caso (for 2007)
- 5 Years
  - Betty Cronin
  - Jean Gustave
  - Marie Berrouet (from 2007)
  - Lorin Weinreich
- 8 Year
  - Lisa Banul
  - Jane Quintal
  - Dee Fils
  - Kathy King
- 10 Year
  - Ellen Burgio
- 15 Year
  - Barbara Leth
- 20 Years
  - Barbara Wood
- 25 Years
  - Bob Cleary
  - Fran Dupuis