



Annual Report

FISCAL YEAR 2013



We are pleased to report that Fidelity House has made significant progress toward the goals outlined in the agency's strategic plan. Starting with the move to Heritage Place, 439 South Union Street in Lawrence, after 27 years in the prior location, Fidelity House has proved that it can work on infrastructure and capacity building projects while carrying out services for 630 individuals living with developmental disabilities. The following is a brief summary of some major achievements of 2013.

Family Support Center

With the help of three private foundations and the Massachusetts Department of Developmental Services, Fidelity House created a multi-functional Family Support Center that is already being used for activities as varied as workshops on guardianship to events such as trick or treating on Halloween and singing, loud and strong, on family chorus nights. The Family Support Center's three computer stations form an "Internet Café," a place where families can access online resources as well as guidance from Fidelity House staff. All of the Family Support Center's educational, therapeutic and recreational programs are adapted each year to better the lives of 440 children, teens and adults with developmental disabilities as well as hundreds of their family members. Keeping Fidelity House in Lawrence, where we can be accessible to some of the neediest families, is a point of pride for Fidelity House.

Updated Facilities

The new location brings with it much more space for training and events. There is new audio-visual equipment in all of our conference and training rooms plus a new computer network and server room.

Case managers, nurses, and program directors, who work primarily in the field, now have drop-in and meeting space available to them in the central office as well as wireless access to the network. Of particular delight is the placement of 21 original art works on the newly built-out walls of Fidelity House! Thanks to the Art Connection, a nonprofit organization based in Boston, a Fidelity House committee was able to select art from a large collection of donated pieces. Mounted in the common areas, the art will be enjoyed by program participants and families, employees and guests for many years to come.

Diversification of Revenue

The overall financial health of the agency remains strong. For the 5th straight year, revenues increased by an average of 5%, and we ended the year with a modest surplus.

Fidelity House continued to diversify its sources of revenue by expanding the Adult Foster Care program and gaining more

MISSION OF FIDELITY HOUSE HUMAN SERVICES

The mission of Fidelity House Human Services is to assist people with developmental disabilities to participate with friends, families and neighbors in the life of their community and achieve the richest and fullest life possible. The agency strives to support the choices and meet the needs of the people it serves through a portfolio of diversified offerings including residential, educational, vocational, developmental and advocacy services.

Home & Community

AND THE CHIEF EXECUTIVE OFFICER

support from private foundations, individual donors and corporate sponsors. Toward the goal of further increasing community awareness and support, Fidelity House formed a cross-functional marketing team. With the professional assistance of Randstad Technology's marketing department, provided on a pro-bono basis, the team has examined its "brand," developed new messaging, made plans to update the agency's website and use of social media and completed several new marketing projects.

Strategic Information Technology Plan

Improving the organization's technology infrastructure is an important strategic goal for Fidelity House. In fiscal year 2013, an external technology consulting firm and the Moakley Center for Public Management at Suffolk University assisted with the development of a strategic information technology plan. The plan reflects the priorities of the organization, which are to increase efficiency for the ultimate purpose of enhancing services. Specifically, Fidelity House will be creating a SharePoint intranet, automating the timesheet submission process, and working toward implementation of an electronic health records database and performance measurement system.

Adaptation of Residential Services

Fidelity House's residential services staff continues to respond to the challenges of aging and the increasingly complex medical needs of 190 adults with developmental disabilities. This year's activities focused on specialized staff training, renovations to improve wheelchair accessibility and exploration of potential replacements for multi-story group residences. The compassion and expertise of direct care employees was most evident as Fidelity House tailored end-of-life care for several long-time friends. It was very difficult to say good-bye to Deb D'Agata, Bruce Emery, Luz Figueroa, Adrian Rivera, Agnes Samia, Patsy Veilleux, Ronald Zazzo, James Baril, and Deb Brigham, all of whom were vibrant members of the Fidelity House community and the larger Merrimack Valley community. Knowing that each had a home, in every sense of the word, was a source of comfort.

We are grateful to all of our board members, donors, foundations, golf tournament participants, volunteers, corporate sponsors, and employees who have helped Fidelity House achieve its goals. Thank you for being our partners for a better life.



Andrew Novelline
President of the Board of Directors



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Partners for a Better Life

ADULT FOSTER CARE MAKES IT HAPPEN



Maria and Robin celebrate Robin's birthday at home.

Adult Foster Care is the newest program at Fidelity House. It is a Mass Health funded program that provides a stipend to family members or non-family members enabling them to better care for individuals with disabilities living with them in a home setting. The goals of the program are to delay or prevent out-of-home placements for individuals who are unable to live alone safely and to continue to support individuals with changing needs within their agency of choice. Every member of the program is followed by a professional team including a care manager and a registered nurse. Every caregiver receives training and support from the Fidelity House team to help meet the needs of the individual in the program.

There are currently over twenty members/families enrolled in the program at Fidelity House and it continues to grow quickly. Some of the members live at home with their parents, a sibling or another relative. Others live with a non-family caregiver. Robin has been supported by Fidelity House for over 30 years. Previously, she lived independently and for the past thirteen years with a roommate. Due to increased levels of need for care, Robin moved in with her caregiver Maria in the summer of 2012. Maria opened not only her home to Robin but integrated her into the extended family. Maria's mother Juana has become another caregiver for Robin and they enjoy time together every week. She also looks forward to spending holidays with Maria and other family members. She enjoys helping Maria cook for the holidays and entertaining their guests.

*“I am very happy that Maria takes good care of me.
I enjoy living here with Maria.”*

George and Rachel enjoy a day at the fair.



George is another member of the Fidelity House adult foster care program. Previously he lived in Rhode Island with his family. While living there, George got to know Rachel and Ryan, a young couple who worked for ten years in his day program until moving to the Merrimack Valley last year. When George's family, who are aging, asked Rachel if she could take George in, she was happy to do so knowing she would get full support from Fidelity House. George made a big transition by leaving his family in Rhode Island but he has done well with the support of Rachel and Ryan. They are very dedicated to keeping George happy, healthy and home!

Your House or Our House

SUPPORTING FAMILIES IS MISSION CRITICAL

While professional case managers and service navigators continue to spend time on the road throughout the region making home visits to families, attending school meetings and interpreting at medical appointments and more, they are now able to offer more group support and activities at our new Merrimack Valley Family Support Center here in Lawrence. Our new location is convenient for all area families as it is fully accessible, has plenty of parking and is on the bus line and near the train station too.

It has been an exciting change for staff and for families. Our wonderful new space is larger and more welcoming and gives us the flexibility to design activities and programs to meet the needs of our families. We are very grateful to The Mass Department of Developmental Services and the Tower Foundation for funding state of the art audio visual equipment. We have already put the large screen and projectors to good use with parent workshops, ESL classes, family movie nights, family chorus, teen & adult recreational activities and holiday-themed events. Aspiring artists in our art therapy program have enjoyed the new art room, partially funded by the Stevens Foundation and the Webster Family Fund. Many of the art pieces created by our teens were proudly displayed for the open house held this November.

One of the new therapeutic programs we have initiated is a social pragmatics group. With funding from the John Alden Trust, we have offered a program for teens designed and run by our own behaviorist Shauna Hodge. The young adults are learning new social skills or reinforcing existing ones in a positive supported environment. A parent/guardian support group is run simultaneously. All involved are gaining skills and making friends and connections. In 2014, we hope to offer the program to younger children as well.

Upcoming programming for 2014 will include a parent workshop on dealing with the post-holiday blues; "Mommy and Me" yoga classes for younger children; a Girls Night Out for tweens/teens and their moms, which is sure to include a manicure. Many more family events will be held here in our Family Support Center and in the community. One of our actively involved moms, P. Navarette, has succinctly stated our mission and hope for all of our families:

"Fidelity House has always been a direct support, not only for Luis but also for the whole family. They have helped me get to know Luis' condition and understand him better; what are his needs, what are his differences compared to other kids. Integrating Luis into the community was something I struggled with in the past. However, the inclusion of the entire family in recreation activities has let us see the enjoyment in Luis' face and that he too can be part of society. Fidelity House has also taught us how we can be our child's best advocate, how to be his voice, by providing us with trainings as well as the support groups."



Luis makes a great caped crusader and has a happy Halloween in the Family Support Center.

Fidelity House

SERVING INDIVIDUALS AND FAMILIES FOR OVER 40 YEARS

We've Moved ~ Open House Celebration



Year Round Fun with Friends and Family



PARTNERS FOR

EXPRESS Yourself!



With a Little Help from Our Friends



A Friend and A Home

ADAPTING TO CHANGING NEEDS – MAINTAINING QUALITY OF LIFE

Rodney has lived in Lawrence all of his 79 years. Even today he can tell you about people and places in Lawrence that he remembers from his childhood. At one time he walked to his favorite places, played bingo at many locations and redeemed bottles and cans regularly at Market Basket. However, like many of the individuals we serve, Rodney's health concerns have increased in number and complexity over the years. This has been a challenge not only for Rodney but for the staff who support him. More than once we have been concerned not only about his quality of life but that he might not survive a serious illness.

He lives in the Fidelity House on Haverhill Street and has called it home for many years along with many of the long term residents and staff. In spite of his increased medical needs, keeping Rodney home and maintaining a high quality of life for him has been a priority. The staff that assist him have had to learn many new skills: how to prepare his meals so he won't aspirate the food, how to help him with oxygen, how to care for his personal needs, how to use a nebulizer to assist him to breathe, how to take care of his fragile skin. David Kamau is one of those dedicated staff members. David has worked with Fidelity House for nearly ten years and has been working one-to-one with Rodney for three years. His patience and his skill have helped Rodney maintain his health and his sense of humor. The Fidelity House nursing staff provides on-going



David helps Rodney enjoy a full life.

and individualized training for staff like David. He says that the skills he has gained will be useful in other jobs as well. His supervisor, Beth Termini, notes, "Because David does these tasks every day, he is a resource to other staff members."

When asked about how his medical problems have affected his life Rodney says they are "not a big deal," but he has had to make many changes in his way of life. Beth Termini reminded him, "These changes are keeping you alive." Rodney said with a grin, "I don't want to be in the ICU or in a casket." With David's help, Rodney does participate in many activities. He goes to the library and sometimes to the senior center for Friday lunch. He goes to dances on Friday nights and visits with friends. He has a long-time girlfriend and spends time with his brother.

Rodney is only one of many individuals served by Fidelity House Residential Services who have experienced health changes that have resulted from chronic medical conditions that have worsened over time. Our most recent medical issues survey showed that in our Residential division, we serve 85 people aged 50 and over, 28 with cardiac concerns, 38 with dysphagia, 25 with diabetes, 51 with seizure disorders, 28 with asthma, bronchitis or COPD, 20 with cerebral palsy or other neuromuscular disease, 13 with chronic kidney disease and six require a gastrostomy tube for nutrition. Four nurses assigned to the various programs are kept busy training staff like David to learn new skills and provide good care and quality of life.

In spite of his increased medical needs, keeping Rodney home and maintaining a high quality of life for him has been a priority.

COMBINED STATEMENT OF FINANCIAL POSITION

	June 30, 2013	June 30, 2012
ASSETS		
Operating Cash and Savings	\$ 1,004,179	\$ 737,638
Restricted Cash and CD	135,231	126,366
Other Current Assets	813,396	1,094,331
Investments	894,880	793,186
Property and Equipment	3,072,855	3,123,603
Financing Fees	104,348	106,007
Total Assets	\$ 6,024,889	\$ 5,981,131
LIABILITIES AND NET ASSETS		
Current Liabilities	\$877,439	\$1,138,531
Long-Term Debt	1,785,203	2,168,641
Conditional Debt	949,088	507,118
Net Assets	2,413,159	2,166,841
Total Liabilities and Net Assets	\$ 6,024,889	\$ 5,981,131

COMBINED STATEMENT OF FINANCIAL ACTIVITIES

	June 30, 2013	June 30, 2012
OPERATING SUPPORT AND REVENUE		
Contracts and service fees	\$11,250,920	\$10,841,934
Client fees and rents	820,005	669,883
Rental subsidies	236,979	238,043
Grants and contributions	65,712	69,882
Donated goods and services	55,678	27,728
Interest and other	30,282	20,752
Total Operating Support and Revenue	12,459,576	11,868,222
OPERATING EXPENSES		
Program services	10,963,046	10,604,524
General and administrative	1,315,902	1,253,229
Fundraising and development	120,693	129,264
Total Operating Expenses	12,399,641	11,987,017
Changes in Net Assets from Operations	59,935	(118,795)
OTHER REVENUES		
Net realized and unrealized gains on investments	97,384	98,715
Contract revenue for property and equipment	59,563	46,526
Capital grants	29,436	25,000
Total Other Revenues	186,383	170,241
Change in Net Assets	\$ 246,318	\$ 51,446

The above selected financial data has been taken from the audited financial statements prepared by the CPA firm of Alexander, Aronson, Finning, & Co., P.C. for the fiscal years ended June 30, 2013 and 2012. These audited financial statements will be filed with the Massachusetts Office of the Attorney General, and are open to public inspection online at the Operational Services Division (OSD) website under the Uniform Financial Reports eFiling home page.

Fidelity House

THANK YOU TO OUR SPONSORS AND DONORS FOR 2013

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Fidelity House Human Services is funded through contracts with the Department of Developmental Disabilities, the Massachusetts Rehabilitation Commission, MassHealth and through private contributions.

Referrals are made through the Department of Developmental Disabilities. An individual or family member can make direct inquiries for information to Fidelity House Human Services.

Fidelity House Human Services

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