Empowering people with disabilities including autism through education, jobs and homes.

GUIDING PRINCIPLES:

• Is person-centered.
• Embraces individual choice and personal development.
• Builds collaborative relationships with families, friends, and communities.
• Promotes inclusion and participation.
• Creates opportunities for informed and responsible decision-making.
• Ensures and protects human and civil rights.
• Promotes supportive social environments and attitudes.
• Develops exceptional, supportive staff.
• Advances leadership through sound financial management and planning.
LIFEWORKS FY 2020
BOARD OF DIRECTORS

Edmund Ferrara  
Chairman

Thomas Erhard  
Vice Chairman

Cheryl Gorman  
Treasurer

Sheila Coakley, Esq.  
Clerk

Paul Cummings

Paul Falvey

Heidi Haggman

Jane McClellan

Kevin Murphy

Garrett Traylor

All Board Member terms expire on June 30, 2020

LIFEWORKS GENERAL
MEMBERSHIP LIST FY 2019

William Abel
Pauline Allen
John and Tracy Atkinson
Brad and Kim Benson
Helene Bier
Jerry and Mary Ann Boulet
Maurice and Bernice Contee
Cheryl and Colleen Cummings
Leslie Cusack
Susan Allen DeVeuve
Lucy Erhard
Bob, Kathy and Ted Falvey
Jack and Nancy Ferris
Suzanne Findlen
Mike Fitzgerald
Bob Forsberg
Alan and Claire Giancola
Claire Hellweg
Glenn and Janine Kurth
Susan Lubitz
Shelton Miller
Mary Mulligan
Karen Norton
Stephen and Jude O’Hara
John O’Connell
Margaret Quinn
Mike Razza, Esq.
Nancy Sally
Diane Simonds
Anna Sweet
Joseph and Mary Wallan
Nora Walsh
Michael Walsh
Roger Walsh
Natalie Woodward
Lifeworks Management Team

Daniel Burke, President/CEO
Christopher Page, Chief Operating Officer
Brenda Calder, Chief Financial Officer
Elizabeth Parker, Director of Human Resources
Danielle Warzecki, Vice President of Residential Services
Pam Henderson, Sr. Director of Residential Services
Holly Goguen, Director of Residential Services
Jenny Jezak, Director of Residential Services
Laura Klinedinst, Director of Residential Services
Michelle Medas, Director of Residential Services
Darrell Daybre, Director of Individual Home Supports
Mary Ellen Cameron, Director of Employment Services, Norwood
Kevin Smith, Director of Employment Services, Boston
Stephanie Hajjar, Director of Quality Assurance
A Message from Our Leadership

We are pleased to provide you with the 2019 Annual Report from Lifeworks. Our agency continues to be a leader in supporting individuals with intellectual and developmental disabilities, including autism. Our services offer a diverse platform of supports in all areas of our agency. Our Employment programs continue to provide a broad range of job opportunities that are included in our local communities. As a part of our Employment services, we offer job development, job placement, and coaching. The Life Enhancement program focuses on community-based volunteer opportunities, educational experiences, exercise, and activities designed to support the individual employment goals and person-centered goals of the people we serve. The Individual Home Supports program works with people who live independently in their local communities. Lifeworks also offers an extensive array of Residential services for those who live in homes supported by the agency. Group Homes provide 24/7 supports to the people who live there. Individual Home Supports (IHS) provides services to people who live in their own apartments or homes. These supports vary in service hours per week based on the needs of the person receiving those services. Shared Living is a service where individuals are placed with families in the community, in their home. This is our agency's newest service and continues to expand.

This year Lifeworks is proud to be moving our Boston Employment Center into a new state-of-the-art 17,000 square foot facility. We are happy to announce that the program is staying in West Roxbury. This program will continue to provide Employment Services and Community-Based Day Services (CBDS), which we call our Life Enhancement Program. We are also excited that we will be sharing this new building with our sister organization, The Arc of South Norfolk. The Arc is moving their Senior Connections Program to this location. The Arc has provided Day Habilitation Services through this program in another location in West Roxbury for a number of years. The Arc will also be offering services from Harbor Counseling at this location. Both organizations are thrilled to be moving to this new spot and further our affiliation.

We invite you to review our Annual Report, and thank you for taking an interest in Lifeworks and our services. We are grateful for your support and input. Please feel free to contact either of us if you have any questions or thoughts on how you might be able to further support our services.

Sincerely,

Daniel Burke
President/CEO

Christopher Page
Chief Operating Officer
Pecunit Street
Canton, MA
The gentlemen at the Pecunit house are doing well. They have had a challenging year medically, and a lot of their resources and time have gone to addressing those issues. Recently, they have welcomed two new residents. They have adjusted well to their new home and are enjoying the company of their new housemates. They enjoy doing seasonal craft projects that are displayed throughout the house. They love to cheer on their favorite sports teams and are often dressed up in their sports gear while watching the games. During the nicer weather, they enjoy going to the park and having cookouts with friends.

Cowell Street
Plainville, MA
The Cowell St. folks continue to remain active, healthy, and happy! They faced some health issues over the year, but that has not stopped them from remaining active in the community. They have developed friendships with staff at local merchants and wait staff at Chili's. A few of the residents enjoyed tribute bands and musicals at the Stadium Theatre, trip to the Cape for a seafood dinner, town events, and local attractions.

Kinsman Place
Natick, MA
The individuals at Kinsman Place stayed busy with activities this year. They continue to enjoy weekend trips, whether it be horseback riding, walks along The Fatima or small backyard barbecues where they jam out to their favorite tunes played by a long-time staff. Kinsman got to enjoy some other fun things this year like Barnyard Babies that brought their community together, farm trips around Natick and surrounding towns, and local dances to socialize and meet new people. It has been a great year at Kinsman Place with new experiences, and hoping for many more.

High Street
Westwood, MA
The gentlemen at the Westwood Residence had some ups and downs this past year. They participated in some exciting activities throughout the year, including visiting Cape Cod, Edaville Family Theme Park, and the Franklin Zoo. They also said goodbye to a dearly loved housemate who passed away. A fifth member was welcomed into their residence. His quick wit, and sarcastic sense of humor has kept everyone in the house laughing! The new resident has helped to boost the spirits of all the gentlemen and bring a new dynamic to the house!
Bradford Drive
Norwood, MA
The Bradford program has four male residents who are retired and all attend Norwood Adult Day Health Center. Sadly, we lost one resident this past year, and our team did a wonderful job caring for him during his last days. We were lucky enough to have a long-time IHS resident move in. He is becoming acclimated to the house and enjoys the companionship of the other three gentlemen. This past year the residents have celebrated two big birthdays, an 80th and an 85th! The men still enjoy going to Plainridge Casino, Norton Farm, Harlem Globe Trotters, Car Shows at Patriot Place, and out for ice cream. The staff continues to provide exceptional supports to all of the men at the house as they age gracefully.

Rockwood Street
Walpole, MA
The Rockwood house has three male residents; one attends AEI in Mansfield, the other two attend LES in Norwood. There are also two female residents; one attends The Arc in Westwood, the other attends A.S.A. in Wellesley and is also employed by CVS Pharmacy in Dedham. The residents at Rockwood enjoy going for walks in their neighborhood, going to the Foxboro YMCA, bowling, basketball, and helping with the upkeep of the outdoor flowers. In the nicer weather, they enjoy BBQ’s and sitting out on their back porch, relaxing on their swing & hammock, and challenging each other at yard games.

High Street
Sharon, MA
The High St. program in Sharon houses five ladies. Two of the ladies attend LES in Norwood, one attends HMEA Redemption Center in Plainville, Charles River in Needham, and another attends The Arc in Westwood. These energetic ladies enjoy gardening, decorating for the holidays, arts and crafts, and making their seasonal ‘Ugly Sweaters.’ They also enjoy going on outings together. They recently went to the “Big Apple Circus” and fun was had by all!

Chatham Road
Norwood, MA
The Chatham program houses five ladies who continue to keep the staff on their toes! Two of the ladies have transferred to The Arc in Westwood to join another one of their housemates. Two of the other ladies attend LES in Norwood. The ladies of Chatham house love to get pampered by getting their hair and nails done at a local beauty salon. They continue to utilize Trips R’ Us for vacations. They have gone to ‘Beach Boys,’ Disney trips/cruises, and Florida for Red Sox training camp, just to name a few. Some of the ladies attended Camp Fatima, which they look forward to every year. The bond between these five ladies is strong, so strong that they call each other “sisters.”
Howard Ave.
Foxboro, MA
This home is nestled in the downtown area of Foxboro. Six men share the home, and all have a wide variety of interests. They enjoy weekly bowling leagues, soccer games, trips to local restaurants, festivals in the downtown area, as well as the annual Christmas Open House, and Founders’ Day block party with the neighbors. Some residents are employed, either competitively or with some supports, while others are enjoying retirement.

Clapboardtree St. Apartments
Norwood, MA
The Clapboardtree St. apartments currently support 11 individuals. Staff continue to assist each resident in maintaining their independence. Some of the residents have gone on great trips, which include: WWE wrestling events, Chicago, Florida, and Cape Cod. All are looking forward to the summer months and outdoor activities, which include the annual cookout and the two annual Banquets. They enjoy weekly bowling, soccer games, softball, basketball leagues, Pawsox games, walks in the park, movies, mini golf, video arcades and clubs, which include Leadership and Our Club. One long-time resident moved out and a new resident moved in.

Grist Mill Lane
Natick, MA
The beautiful ranch on the corner of Route 16 and Grist Mill Lane is home to five wonderful ladies. They are always out in the community keeping busy with fun activities they enjoy, or hanging with friends, or just shopping. The house started hosting family get-togethers throughout the year so that families can connect, and everyone can spend some quality time together. Some things that they really enjoyed this year were going on the Duck Tours in Boston, Jordan’s Furniture’s Enchanted Village, trips to the Sunshine Farm and to the movies. This year the ladies will be busy with the vegetable garden, anxious to share what they grow with their families and friends.

Vine St.
Wrentham, MA
The Vine St. home has four residents, two gentlemen and two ladies. They all continue to enjoy community activities year-round that include: the Classic Car Shows and picnics at Slater Park, picnics and trips to Capron Park Zoo, and concerts on the Common. They enjoy Wednesday movie nights, where they are shown previews on the computer and decide as a group what movie they want to see. Apart from the various activities, the Vine Street residents continue to manage through health challenges stemming from Alzheimer’s, to medical/behavioral issues. Nonetheless, the dedicated team of direct support staff does an extraordinary job of keeping our residents safe and well as they age.
Adamsdale Road
Attleboro, MA
The five gentlemen at the Adamsdale program enjoy spending time together, both in the community and at the residence. As the time goes by, they have all become interested in spending more time with each other as well as staff of choice for outings. Positive relationships between the guys and staff continue to grow. The men are also spending more time with their families, going home for the day, overnights, and receiving visits as well. The guys love attending leadership groups, yard sales, dances, shopping, movies, malls, and local parks. They participate in bowling and softball, and look forward to going to camp at Grotonwood and vacations every year. Last year they went to Maine, New Hampshire and day trips to Boston.

Elm Street
Canton, MA
The five individuals residing at Elm Street have had a great year. Some of the highlights include: a trip to Boothbay Maine, Red Sox Games, Boston Aquarium, Science Museum, and WWE events. The individuals have enjoyed getting to know Canton, while continuing to maintain close ties to Norwood. A continued favorite activity is meeting friends on Saturday morning at the Dunks in Norwood. The individuals are looking forward to starting their yearly garden and having friends and family over for BBQ's. The individuals have enjoyed continued participation in the social and recreational programs at The Arc, as well as local events in the surrounding community. The Elm Street staff enjoy striving to keep the individuals happy, healthy and supported in their home and community.

South Street
Foxboro, MA
South Street houses three men and one woman, who have taken a trip around the world this year from the comfort of their own home! South Street took on the goal of visiting different countries and immersing themselves into the culture that includes music, food, films and crafts. They visit the library to get ideas at the beginning of the month and select a country to visit. They find recipes, music, movies and crafts to do during the weekend to help learn about the country. Often times, they have incorporated local musical festivals and restaurants into the theme.

St. George Ave.
Norwood, MA
The South Norwood program is comprised of two apartments. In both apartment A and B reside one women and three men. All of the residents enjoy spending time together and participating in shared interests and outings in the community. They all enjoy going to dances, such as the Hip-Hop café, and attending The Arc’s Sports Banquet, and the LES Banquet each year. Five of the individuals enjoy and participate in the Arc’s Sunday bowling league. Several of the folks choose to go on day and overnight trips with Trips R Us, a recreation provider, to various destinations. Animal Craze came to the house with their furry friends for everyone’s enjoyment. It was a great hit with the individuals, families, and staff.
Adamsdale Road
Attleboro, MA

Elm Street
Canton, MA

South Street
Foxboro, MA

St. George Ave.
Norwood, MA
The four men and one woman at Whitewood have had a busy year in their home. They have hosted many events, including Thanksgiving, Christmas and an Easter brunch. From trips to the Vineyard, visiting local parks, going to the latest movies, shopping, down-hill skiing, and a trip to Disney, the residents have kept themselves and their staff very busy!
Individual Home Supports
Individual Home Supports Program

The Individual Home Supports Program is thriving and currently supports 38 individuals in Norwood and surrounding areas. We had an exciting year with three new referrals. Our first referral has been an incredible success story. His parents were concerned that he needed a social network in place before he moved into his own apartment, so he was introduced to a number of opportunities and friends; and now he regularly participates in weekly activities with a host of new friends.

Another referral was struggling with financial issues and life skills, but with regular case management and skills training, he is on his way to obtaining a new car and greater independence at home. Our newest referral is beginning to open up and explore new opportunities in the community, and she is becoming more proficient and independent with her finances.

Along with the many success stories of our individuals, IHS continues to carry on our weekly social traditions such as Pizza Tuesdays, bowling, coffee socials; and we expanded our weekend social opportunities with such things as laser tag, hiking, and problem-solving, while navigating the popular “Escape Rooms.” We also continue to take our annual pilgrimage to La Salette, Sturbridge Village, and our week-long trip to Cape Cod.

Recreationally, individuals continue to be active participants in their community, whether it’s playing frisbee in the park, working out at the gym, playing basketball, or taking part in many of The Arc’s sporting leagues, such as: bowling, softball, basketball, floor hockey, and bocce. Many medals were won in several of these Special Olympics events! Individuals also volunteer in various charitable events such as Walk for Hunger, Best Buddy Bike Ride, Breast Cancer Awareness walk, along with participating in the Faith and Light Fellowship at a local church.

With an increased focus on health and well-being, IHS had a very healthy year with fewer illnesses and greater fulfillment. Many individuals participated in strength training, aerobics, yoga, nutrition training, and meditation. Several individuals with higher blood pressure and blood sugar were able to bring their levels down naturally by using these holistic techniques. Overall, it was a healthy, successful year for the IHS program.
Shared Living
Shared Living

Shared Living is a supported living arrangement that provides the individual with a sense of belonging to a family through the sharing of a home and life experiences. Shared Living provides independence and community integration, while also supplying the necessary support and personalized care an individual may require. Lifeworks introduces individuals to households that best suit their unique interests and personal support needs.

Lifeworks’ first Shared Living family reached their two-year mark this spring! They continue to truly enjoy each other’s company, their apartment and their routines. Over the past year, we have placed four new individuals into a Shared Living arrangement. Currently, we have four women and three men receiving services. Our Shared Living Coordinator is working to place several other individuals this year.

We have a Program Manager that oversees and provides case management for the program. As the Shared Living program grows, Teacher/Counselor positions will be added as necessary.
Lifeworks Employment Services
Lifeworks Employment Services

The Lifeworks Employment Services (LES) programs in Boston and Norwood offer a vast array of employment opportunities. This past year has seen lasting growth as we continue to promote our Employment First Initiative, as well as continue to expand and grow our Community–Based Day Program.

Lifeworks has many successful corporate partnerships with various local companies. We offer group- supported employment opportunities at eleven sites. In addition, we had seven individuals work independently at the seasonal sites of Salvation Army and Halloween City.

This past year, fifty-seven individuals were placed in new competitive employment positions; fifty of these individuals maintained the job beyond thirty days achieving an 88% retention rate. In addition to finding individual competitive jobs, the two Job Developers have been focusing on obtaining more group–supported sites. This will give people more opportunities to further enhance their skills, thus helping to make them more employable. Two new group-supported sites have been secured this past fiscal year by adding a second crew of four people at Simpli-Safe and a crew of five at Babson College.

Between both LES programs, over 64 % of the people served earn minimum wage or greater through either group-supported jobs or competitive placements. In addition, the Employment programs provided services to 13 individuals funded through Massachusetts Rehabilitation Services (MRC).

Lifeworks continues to have valuable partnerships with local high schools, assisting with the transition from high school to the working world. We present at many family nights, as well as give tours and provide information to young adults and their families. LES Norwood accepted two new individuals into our program, and LES Boston accepted three. Overall, both Employment programs provided services to 228 people.

As the employment landscape continues to change, our focus remains on “Employment First” and the expanding possibilities for the individuals we serve through the Life Enhancement Program and LES.
Life Enhancement Program
Life Enhancement Program

The Life Enhancement program (LEP) continues to flourish as part of Lifeworks Employment Services (LES) in both Boston and Norwood. LEP offers meaningful and productive activities for individuals and helps to support them in their employment goals. The program offers both on-site and off-site opportunities that build upon people’s strengths and interests, providing them with the tools they need to seek jobs in the community.

Individuals fill out choice lists quarterly, which allows the program to build schedules around their interests as well as ISP goals. Some examples of offerings in the Life Enhancement program over the past year include classes that are focused on: professional behavior, personal hygiene, conflict resolution, and reading and money skills. There is a book club and reading group that each meets once a week as well as weekly cooking classes. We also provide hard skills training on site to help build skills and increase the possibility of obtaining community employment. Some examples of this include: cleaning, bagging, labeling, sorting, inventory, restocking, folding and hanging cloths. Customer service and cashier skills are learned at both Employment locations through the Hole in the Wall Café and Sweet Times training centers.

Off-site LEP has twelve volunteer sites that have provided skill building opportunities for participants, including: Meals on Wheels prep and multiple delivery routes; activity assistant at a nursing home; Helping Hands at a food pantry; packaging nutritious meals for a non-profit for people and their families who suffer from critical and chronic illness; and grounds-keeping at a local Abbey. We have also had volunteer opportunities at the ALS society doing various tasks, such as manning a rest stop for their annual bike ride, assembling swag bags, and other administrative tasks as needed. This past year we added three sites: Norwood Food Pantry, Blessed Sacrament, and St. Mary’s to our volunteer list.

Both Employment sites also have memberships to community gyms allowing for opportunities to exercise, while being integrated in the local community. Groups take dance lessons at a local studio and participate in jewelry-making classes. Our Norwood program has recently introduced music appreciation with the addition of a piano, allowing for some new learning experiences.

We have continued with the two pilot programs developed last year and have expanded both. The creative arts program, which is now offered two days per week, and the Bridge Program, primarily for people on the autism spectrum, who benefit from smaller ratios and more structured activities, is taking place three days per week.
Financial Reports
# Statement of Financial Position

**As of June 30, 2018**  
*With Comparative Totals as of June 30, 2017*

## Assets

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<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash, Cash Equivalents, and Money Markets</td>
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<td>$1,990,683</td>
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<td>Accounts Receivable</td>
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<td>Short Term Investments</td>
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<td>Prepaid expenses</td>
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<td>Due from affiliates</td>
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<td>Other current assets</td>
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<td><strong>Total Current Assets</strong></td>
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<td><strong>Property and Equipment</strong></td>
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<td><strong>Other Assets</strong></td>
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<tr>
<td>Deferred compensation assets</td>
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<td>346,356</td>
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<tr>
<td>Long-term investments</td>
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<td>100,000</td>
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<tr>
<td><strong>Total Assets</strong></td>
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<td>$15,621,651</td>
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</table>

## Liabilities and Net Assets

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<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Liabilities</strong></td>
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<td></td>
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<tr>
<td>Accounts Payable and accrued expenses</td>
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<td>Current portion of long-term debt</td>
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<td>Line of Credit</td>
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<td><strong>Total Current Liabilities</strong></td>
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<td><strong>Long-Term Liabilities</strong></td>
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<tr>
<td>Deferred compensation liabilities</td>
<td>373,672</td>
<td>346,356</td>
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<tr>
<td>Long-term debt</td>
<td>3,186,779</td>
<td>3,282,190</td>
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<tr>
<td>Less: unamortized financing fees</td>
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<td>(88,912)</td>
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<td><strong>Total Long-Term Liabilities</strong></td>
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<td><strong>Total Liabilities</strong></td>
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<td><strong>Net Assets</strong></td>
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<tr>
<td>Unrestricted</td>
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<td>9,407,159</td>
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<tr>
<td>Temporary Restricted</td>
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<td></td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>9,533,019</td>
<td>9,407,159</td>
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<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td>$16,113,595</td>
<td>$15,621,651</td>
</tr>
</tbody>
</table>
LIFEWORKS, INC.

Statement of Activities

For the Year Ended June 30, 2018
With Comparative Totals for Year Ended June 30, 2017

<table>
<thead>
<tr>
<th>Revenues and Support</th>
<th>Unrestricted</th>
<th>Temporary Restricted</th>
<th>2018 Total</th>
<th>2017 Total</th>
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<tr>
<td>Program Fees</td>
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<tr>
<td>Contributions &amp; Grants</td>
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<td>45,459</td>
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<tr>
<td>Investment return</td>
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<td>81,893</td>
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<td>Commercial Products &amp; Services</td>
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<td>Other Revenue</td>
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<td>17,393,257</td>
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<tr>
<td>Net assets released from restrictions</td>
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<td><strong>Grand Total Revenue and Support</strong></td>
<td>17,393,257</td>
<td>17,393,257</td>
<td>17,377,464</td>
<td>17,377,464</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
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<tr>
<td>Residential Services</td>
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<td><strong>Total Program Expenses</strong></td>
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<tr>
<td>Management and General</td>
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<td><strong>Total Expenses</strong></td>
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<td>Surplus</td>
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<td><strong>Net Assets at Beginning of Year</strong></td>
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<td><strong>Net Assets at End of Year</strong></td>
<td>$9,533,019</td>
<td>$9,533,019</td>
<td>$9,407,159</td>
<td>$9,407,159</td>
</tr>
</tbody>
</table>
Functional Expenses Fiscal Year 2018

- **Payroll & Benefits**: $12,910,631 (74%)
- **Occuancy**: $1,610,006 (9%)
- **Program Operating Expenses**: $1,611,430 (9%)
- **Vehicle Expense**: $650,894 (4%)
- **Subcontract Expense**: $378,611 (2%)
- **Meals and Food**: $358,746 (2%)
- **Subcontract Expense**: $378,611 (2%)

Revenues for Fiscal Year 2018

- **Program Service Fees**: $16,643,499 (95%)
- **Commercial Products & Services**: $590,835 (3%)
- **Grants & Donations**: $19,358 (.04%)
- **Investment Revenue**: $99,187 (1%)
- **Other Revenue**: $40,378 (.06%)
In Fiscal Year 2018
92 Cents Out of Every Dollar was spent on Program Services

- Administration: $1,388,074 (8%)
- Program Services: $16,132,244 (92%)