



# The Giving Common

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Beaverbrook STEP Inc.

Current

## General Information

85 Main Street, 2nd Floor  
Watertown, MA 02472  
(617) 926-1113

**Website**

<http://WWW.BEAVERBROOKSTEP.ORG>

**Organization Contact**

Virginia A. Connolly, MEd, LMHC [vaconnolly@beaverbrookstep.org](mailto:vaconnolly@beaverbrookstep.org)

**Year of Incorporation**

1973

# Statements & Search Criteria

## **Mission Statement**

Beaverbrook STEP, Inc. is a private, non-profit, SOMWBA certified organization that provides a comprehensive array of progressive, community based residential, day, employment and support services to adults with intellectual, developmental and related disabilities in Eastern Massachusetts. Our mission and philosophy focus on empowering individuals and their family members to make their own personal choices and decisions about their lives in order to achieve full community inclusion. We focus on helping individuals to realize their dreams and live meaningful lives as productive and active community members throughout the life cycle. We currently provide services to over 170 individuals and 200 family members.

## **Background Statement**

Beaverbrook STEP is a private, non-profit, SOMWBA certified, IRS 501 (c) (3) organization. STEP has been successfully providing adults with intellectual and developmental disabilities with the housing services, clinical supports, health care, employment and social activities they need to fully participate in community life for the past 38 years.

Beaverbrook STEP is governed by an active, all volunteer, community Board of Directors. A pioneer and leader in the de-institutionalization movement, STEP opened one of the first Community Residential Programs in MA for individuals leaving Fernald State School under a landmark court ordered consent decree. Shortly thereafter, STEP expanded the number of residential programs and also began an Individual Supports Program providing support services to individuals with disabilities who wanted to live in their own apartments in the community. Initially services focused on the communities of Watertown, Waltham and Belmont, but eventually services expanded to neighboring communities including Brighton, Boston, Cambridge, Walpole, Arlington, Newton and Brookline.

To further our mission, STEP added the Options Community Based Day Supports Program in 1995, a program for adults with significant needs, who could benefit from the flexible, staff intensive services offered. In 2007 we opened Options Supported Employment Services. Located in a retail building in Waverley Square, Belmont, the program provides supported employment training and placement services to over 30 adults with disabilities. The program trainees also operate 2 unique retail businesses, 'Gifts at Peppermint Place,' and 'Sweet Deals Thrift Boutique' which are adjacent to the program site.

Today, STEP is an \$11 Million organization that provides a comprehensive array of residential, supported living, day/employment, clinical, community and family support services to 170 individuals with intellectual, developmental and medical disabilities and over 200 family members. STEP has earned wide acclaim and recognition as a leader in our field, promoting and supporting inclusion into all aspects of community life for people with disabilities. Beaverbrook STEP has consistently achieved the highest level of licensing and accreditation from the Mass. Department of Developmental Services, Office of Quality Management and Quality Enhancement for the past twenty years.

## **Impact Statement**

### STEP Accomplishments FY 2011:

1. Worked with other area providers to enhance recreation services that promote inclusion and new friendships including the development of a new web site for adults with disabilities called Fun and Friends Connection ([www.funandfriendsconnection.com](http://www.funandfriendsconnection.com)). We also partnered with Belmont Sports Recreation to sponsor a vacation cruise to Bermuda for 50 of our individuals.
2. Implemented new staff education and training initiatives and clinical services to address the changing needs of our population, particularly elders, adults with behavioral issues and people with intense medical needs. We expanded R.N. nursing services, added an ABA clinician and a LICSW to our staff.
3. Extensively renovated 3 residential properties located in Waltham, Watertown and Brookline to address the needs of individuals who need wheelchair accessible homes.
4. Implemented new management systems that significantly increased the timely completion of accessibility projects, safety compliance, and repair and maintenance tasks at residences.

### Goals for FY 2012:

1. Continue to enhance our 'Aging in Place' strategies for individuals by designing and implementing a multi-year project to renovate and make our residences barrier free, expanding capacity whenever possible.
2. Expand recreation, social and sports activities by entering into informal and formal relationships with local YMCAs and local recreation departments such as Belmont Sports. Expand activities through the Fun and Friends Connection partnership for Metro Region.
3. Enhance Behavioral Management resources and provide formal ABA training for STEP managers and staff.
4. Continue to meet the changing needs of our population by developing new programs, expanding housing and staff capacities, expanding community partnerships and developing additional nursing and clinical services.
5. Continue to provide family support services.

## **Needs Statement**

Because of medical and health care advances, as well as new technologies, the needs of the individuals served by Beaverbrook STEP have changed significantly. Most individuals served have multiple disabilities, including physical, developmental, intellectual, mental health and chronic health care needs.

Our needs focus on our strategic goals to renovate our older homes, expand recreational services and educate our staff to better meet the changing needs of our population.

1. \$48,000 to purchase a MV-1 wheelchair accessible vehicle with a deployable integrated ramp that accommodates six occupants and meets ADA guidelines.
2. \$63,500 for renovations to 2 residences, constructing new wheelchair accessible bedrooms, laundry areas and bathrooms.
3. Program start up funds (\$50,000) to provide new, direct support recreation and community inclusion services to adults with disabilities.
4. Using IDEO's Human Centered Design Toolkit, STEP needs \$110,550 to support a 5 year project to develop creative solutions for developing barrier free environments at all remaining non-accessible residences.
5. \$75,000 for expansion of staff training/education and clinical certification programs.

## **CEO/Executive Director Statement**

Beaverbrook STEP is an organization committed to serving adults with intellectual, developmental and other related disabilities. Our services are individually designed in partnership with each person served and their family members. As an organization established in 1973, our mission, philosophy and traditions continue to focus on providing flexible, personalized and quality community based supports that promote inclusion and self-actualization for the people in our care.

We provide services to individuals from 18 years and up, including a growing elder population. Many of the individuals served are dually diagnosed. In addition to intellectual and developmental disabilities, STEP serves adults within the autism spectrum, adults with mental health and behavioral issues and adults with complex and multiple physical and medical disabilities.

Our mission includes providing individuals with the training, support and opportunities they need to fully experience the benefits of community living, as well as educating our community to understand and appreciate the unique gifts and talents of all of its members regardless of ability.

As the needs of people with intellectual and developmental disabilities have changed over the years, STEP has actively embraced new technologies, medical advances, educational strategies and housing models designed to enhance services to people with disabilities. In the 21<sup>st</sup> Century, STEP not only faces many economic challenges, but also challenges related to serving:

- people with disabilities as they age,
- a growing population of people who fall within the Autism Spectrum, and
- young adults with multiple disabilities, including complex medical and health care needs as they age out of special education services.

The key ingredient to our outstanding success is found in our caring, dedicated and well qualified staff, all of whom are committed to developing each person's full potential, while meeting their personal care needs and nurturing growth and independence. Our staff focuses on strengthening relationships among individuals, families, health care providers and community organizations.

Our Board of Directors and Management Team provide the leadership and support needed to enable effective, quality services and supports and educate other care providers and community members about the vital and significant contributions that people with disabilities make to the community. We welcome your participation in our work. Virginia A. Connolly, M.Ed., LMHC

## **Board Chair Statement**

As the parent of a child with special needs, I wanted to share my love of the outdoors with my son and other children with special needs. I began by volunteering my services as a coach for my son's soccer team which began a lifetime of enjoyment for us playing sports and exploring the outdoors. Over the years we have had many adventures canoeing, hiking and camping at Massachusetts State Parks, the Presidential Mountain Range in New Hampshire and other states including the Grand Canyon in Arizona.

I joined the Board of Directors at Beaverbrook STEP in 1986 as a way to further influence the development of community based sports and recreation activities for people with intellectual and developmental disabilities. As a Board member and later as President of the Board, I was fortunate to be able to participate in a journey that changed the lives of people with disabilities. I became part of the movement to design services that were person centered and supports that allowed individuals to be included in the community in every way—home, school, work and leisure.

In 2006 my son turned 22 years old. He transitioned successfully from school to Beaverbrook STEP's Supported Living program. He lives on his own with part time supports from well trained staff who help him to handle the challenges presented by everyday life. He works part time at a local business, is a member of the self advocacy board at STEP and enjoys community recreation and social events. He has a full, active and satisfying life that includes his family members, girlfriend, friends and co-workers.

As the President of the Board of Directors, I work closely with the Executive Director and the Senior Management Team to assure that STEP remains a viable organization-- administratively, programmatically and financially sound. The role of the Board and management is to actively develop state-of-the-art programs, supports and services that meet the ever changing needs of our citizens with disabilities throughout the life cycle. We are committed to hiring qualified, professional staff, providing them with excellent training, fair wages, a positive work environment, as well as opportunities for both personal and professional growth.

Families also participate in many capacities within the organization—as members of the Board of Directors, volunteers at events and committee members. Input from our families is continuously sought and encouraged and family members are considered crucial links to community ties for individuals served and for the organization as a whole.

STEP's success is determined each year by surveying individuals and family members about their satisfaction with the services they receive. Over the past decade, annual satisfaction surveys of families and individuals have consistently indicated 97- 98% satisfaction.

At STEP, we believe that every individual has the right to be included in the community of his/her own choice as an active and valued member. Please help us to keep individual choice and rights possible for people with special needs.

Stan Kruszewski, President

## Service Categories

Developmentally Disabled Services/Centers

Independent Housing for People With Disabilities

Alliances & Advocacy

## Geographic Areas Served

Beaverbrook STEP, Inc. serves Boston, Brighton, Dorchester, Brookline, Cambridge, Newton, Arlington, Waltham, Watertown, Belmont, Walpole and other Greater Boston and MetroWest communities in Massachusetts.

Please review online profile for full list of selected areas served.

# Programs

## **Residential Services**

### **Description**

STEP has 38 years of experience providing residential services to adults with intellectual and developmental disabilities. We primarily own but also lease 31 residential properties and own/operate a HUD subsidized apartment building in our service area. STEP provides 24 hour staff supports for over 100 individuals in nicely furnished, well kept residential homes, designed and renovated to meet each person's accessibility and living needs. We have specialized residences for people with Alzheimer's disease, medical needs and behavioral issues. STEP provides on-going, individual support services to 27 people who live in their own apartments in the community. We also manage 5 Shared Living programs (individuals live with non-disabled roommates or families). Our support staff teach daily living skills, arrange recreation & leisure activities, coordinate or directly provide transportation, clinical services, health care, nutrition, financial and case management services.

### **Budget**

10200000

### **Category**

Human Services, General/Other Residential Care for Individuals with Disabilities

### **Population Served**

People/Families with People of Developmental Disabilities, Adults, At-Risk Populations

### **Program Short Term Success**

A person-centered, Individual Support Plan (ISP) is developed for each person served with input from the person, provider and funding source staff, clinical specialists (as necessary), family members and other significant friends. The goals are articulated and outcome measures are set by the team. The ISP covers a two year span with a team meeting to review data collected and outcomes achieved at the 12 month and 24 month milestones. The plan indicates goals, barriers to achievement of goals, activities to be achieved and specific, measureable data based outcomes including a description of methodology and responsibility for data collection and analysis.

**Program Long term Success**

STEP's residential services provide long term, community based housing, case management, medical and other support services so that adults with disabilities are able to live as independently as possible in a home of their own choosing. The ultimate goal is to prevent individuals with disabilities from living in large, long term institutional settings such as rehabilitation hospitals and nursing homes. At STEP, we strive to provide adults with intellectual and developmental disabilities, adults within the autism spectrum, adults with mental health and behavioral issues and adults with complex and multiple physical and medical disabilities with personal choices regarding their lives. Our highly qualified staff and clinicians provide personal care, education and support services designed to maximize each person's potential and promote community involvement and inclusion. Our annual surveys indicate 97 to 98% of individuals served are satisfied with their services.

**Program Success Monitored By**

Beaverbrook STEP follows a 2 year Strategic Planning process to determine program success. Measurable goals and objectives are developed and then documented through data collection and analysis of Annual Satisfaction Surveys, sent to all family members, friends, and individuals who comprise the Beaverbrook STEP community. Additionally, questionnaires are sent to management staff in order to obtain ideas that will enhance efficiency and productivity. The format of these surveys include questions pertaining to various quality of life areas with responses entered into a Likert Scale, with additional lines provided for further comments.

A one-year review is conducted through a second set of satisfaction surveys, with the same survey as the previous year so comparisons can be made. The expectation of the agency is that overall levels of satisfaction will be maintained at the current level of 97 to 98%.

**Examples of Program Success**

Over the past 38 years, STEP has successfully provided residential services to hundreds of adults with disabilities. STEP's success is determined each year by surveying individuals and family members about their satisfaction with the services they receive. Over the past decade, annual satisfaction surveys of families and individuals have consistently indicated 97- 98% satisfaction.

For individuals served, success includes measurable improvements in building independent living skills such as personal care and hygiene, travel training, social skills, use of community resources such as the YMCA, the library and parks, job acquisition, computer skills, paying bills and meal planning. Program successes also include meeting specialized needs of people served, such as developing residential services specifically for people with Alzheimer's disease, physical disabilities, medical and or behavioral needs.



## Options Day Program Services

<b>Description</b>	<p>OPTIONS ALTERNATIVE DAY PROGRAM is located in a storefront on Main Street, Watertown. With a high staff to individual ratio the program serves 20 adults with significant disabilities, providing small group instruction in the arts and community activities and trips.</p> <ul style="list-style-type: none"><li>• Flexible, individualized schedule daily;</li><li>• Personal assistance/ skill building;</li><li>• Arts and crafts activities overseen by Art Therapist;</li><li>• Paid work and volunteer opportunities;</li><li>• Community activities: library, YMCA, museums, trips.</li></ul> <p>OPTIONS EMPLOYMENT SERVICES provides 30 adults with employment training and placement services. Based in a renovated building in Belmont's retail area, participants also operate 2 adjacent retail businesses: Gifts at Peppermint Place and Sweet Deals Thrift Boutique.</p> <ul style="list-style-type: none"><li>• Assessment and career plan development;</li><li>• Career exploration &amp; planning;</li><li>• Job readiness skills, job search &amp; placement;</li><li>• Job coaching;</li><li>• Job supports and follow up services;</li><li>• Approved DDS and MRC provider.</li></ul>
<b>Budget</b>	800000
<b>Category</b>	Human Services, General/Other Services for Individuals with Disabilities
<b>Population Served</b>	People/Families with People of Developmental Disabilities, Adults, Other Health/Disability
<b>Program Short Term Success</b>	<p>As described previously, an Individual Support Plan (ISP) is developed for each person served with input from the person served, provider and funding source staff, clinical specialists (as necessary), family members and other significant friends. The goals are articulated and outcome measures are set by the team. The ISP covers a two year span with a team meeting to review data collected and outcomes achieved at the 12 month and 24 month milestones. The plan indicates goals, barriers to achievement of goals, activities to be achieved and specific, measureable data based outcomes including a description of methodology and responsibility for data collection and analysis.</p>

**Program Long term Success**

STEP's day program services provide long term, community based day program services designed to provide alternative community based services that focus on the arts, employment training, paid work and volunteerism. Staff provide a job readiness curriculum, including career exploration and planning, on the job training, transportation training and placement services. Community activities include cultural activities, physical exercise, health care and social skills attainment. Individual goals and objectives are set each year for day program services with outcome measures and timelines as part on each person's Individual Support Plan. The ultimate goal is to allow individuals to live as independently as possible and to promote inclusion of individuals with disabilities into all aspects of community life--work, community and civic participation, social and recreational activities. Our Annual Survey results indicate 97 - 98% are satisfied with their day program services.

**Program Success Monitored By**

Beaverbrook STEP follows a 2 year Strategic Planning process to determine program success. Measurable goals and objectives are developed and then documented through data collection and analysis of Annual Satisfaction Surveys, sent to all family members and individuals who comprise the Beaverbrook STEP community. Additionally, questionnaires are sent to management staff in order to obtain ideas that will enhance efficiency and productivity. The format of these surveys include questions pertaining to various quality of life areas with responses entered into a Likert Scale, with additional lines provided for further comments.

A one-year review is conducted through a second set of satisfaction surveys, with the same survey so comparisons can be made. The expectation of the agency is that overall levels of satisfaction will be maintained at the current level of 97 to 98%.

STEP services are also evaluated by our government funding resources.

**Examples of Program Success**

STEP has successfully served hundreds of adults with intellectual and developmental disabilities over the past 20 years. We have developed a highly successful curriculum for job readiness training that has prepared individuals for community based jobs. All individuals who desire to work are afforded paid work and training opportunities including working at: our 2 businesses (Gifts at Peppermint Place and Sweet Deals Thrift Boutique); community based jobs (Macy's, Petco, Stop & Shop, Toys 'r Us, Belmont Car Wash, Belmont Media etc.); and Meals on Wheels for Springwell of Watertown, MA. Volunteer opportunities are also available and some Options individuals create arts and crafts items for retail sale at our gift store.

## Family Support Services

### Description

Beaverbrook STEP provides Family Support Services in partnership with over 200 family members, advocates and guardians. The following services are provided to maximize communication and support:

- Educational Workshops,
- Social Events,
- Family Support Newsletter,
- Advocacy News Bulletin,
- Web Resources, and
- Resource Library.

### RESPITE CARE SERVICES

When the primary caregiver is absent or needs relief, STEP offers 2 Respite Care services:

- Site-Based Respite Care beds for short or longer term care.
- In-Home Respite Care at the individual's home for a few hours/ week or for a vacation.

### AGENCY WITH CHOICE

Individuals living at home with their families who choose STEP as their Agency With Choice provider share responsibility for the design, development and implementation of their own self-directed, personal Plan of Care. Services available include in-home supports, day services, community activities, homemaker, respite, skills training, companionship and more.

### Budget

50000

### Category

Human Services, General/Other Services for Individuals with Disabilities

### Population Served

Families, People/Families with People of Developmental Disabilities, Other Health/Disability

### Program Short Term Success

An Individual Support Plan (ISP) is developed for each person served with input from the person served, provider and funding source staff, clinical specialists (as necessary), family members and other significant friends. The goals are articulated and outcome measures are set by the team. The ISP covers a two year span with a team meeting to review data collected and outcomes achieved at the 12 month and 24 month milestones. The plan indicates goals, barriers to achievement of goals, activities to be achieved and specific, measureable data based outcomes including a description of methodology and assigned responsibility for data collection and analysis.

**Program Long term Success**

Beaverbrook STEP's goal is to establish strong linkages with family members in order to promote family participation and involvement, provide education and guidance, promote understanding and communicate and optimize services to the individuals served. STEP has an active Family Support Group in which many parents, adult siblings and other involved caretakers participate. Families also participate in many capacities within the organization—as members of the Board of Directors, volunteers and on committees. Input from our families is continuously sought and encouraged and family members and guardians are considered crucial links to community ties for individuals served and for the organization as a whole.

The long term focus is to empower families and allow them together with their family member to orchestrate their own personal life vision and choose the services they need and desire.

**Program Success Monitored By**

Beaverbrook STEP follows a 2 year Strategic Planning process to determine program success. Measurable goals and objectives are developed and then documented through data collection and analysis of Annual Satisfaction Surveys, sent to all family members, friends, and individuals who comprise the Beaverbrook STEP community. Additionally, questionnaires are sent to management staff in order to obtain ideas that will enhance efficiency and productivity. The format of these surveys include questions pertaining to various quality of life areas with responses entered into a Likert Scale, with additional lines provided for further comments.

A one-year review is conducted through a second set of satisfaction surveys, with the same survey so comparisons can be made. The expectation of the agency is that overall levels of satisfaction will be maintained at the current level of 97 to 98%. STEP's services are also evaluated by our funding sources.

**Examples of Program Success**

Over the past 38 years, STEP has successfully provided family support services to hundreds of parents, siblings, guardians, extended family members and other persons who are significant in the lives of our individuals. STEP's success is determined each year by surveying family members about their satisfaction with the services they receive. Over the past two decades, annual satisfaction surveys of families and guardians have consistently indicated 97- 98% satisfaction.

In addition to surveying families each year STEP develops program goals with outcome measures. Last year we published 3 newsletters and 2 Advocacy Updates; held a Health and Nutrition for Adults with Disabilities workshop for families; and hosted several family social events including the annual self advocates and family B-B-Q. We also developed a library on Aging Issues and Elder Resources for families.

## Community and Recreational Services

<b>Description</b>	<p>STEP is a leader in our field in the provision of recreation, leisure and community activities that promote community inclusion, active civic responsibility and use of local resources. Individuals receive the supports necessary to shop, bank, recreate and participate in community events. Through the Community Advocates Board (CAB), participants are active, contributing leaders in their communities.</p> <p>Our clinical specialists, support staff and self advocates are continuously looking for new opportunities for participants to:</p> <ul style="list-style-type: none"><li>• Consult with community groups and elected officials to advocate for policies to advance the lives of people with disabilities;</li><li>• Shop, dine and recreate at local stores, restaurants and entertainment establishments;</li><li>• Meet new friends in the community;</li><li>• Visit their favorite places, including the library, museums, YMCA, parks and beaches;</li><li>• Participate in various cultural activities;</li><li>• Take vacations and trips; and</li><li>• Volunteer their services in their community.</li></ul>
<b>Budget</b>	150000
<b>Category</b>	Human Services, General/Other Services for Individuals with Disabilities
<b>Population Served</b>	People/Families with People of Developmental Disabilities, Other Health/Disability, Poor, Economically Disadvantaged, Indigent
<b>Program Short Term Success</b>	<p>An Individual Support Plan (ISP) is developed for each person served with input from the person served, provider and funding source staff, clinical specialists (as necessary), family members and other significant friends. The goals are articulated and outcome measures are set by the team. The ISP covers a two year span with a team meeting to review data collected and outcomes achieved at the 12 month and 24 month milestones. The plan indicates goals, barriers to achievement of goals, activities to be achieved and specific, measureable data based outcomes including a description of methodology and responsibility for data collection and analysis.</p>
<b>Program Long term Success</b>	<p>The ultimate goal is to provide specialized supports and training that allow individuals to use generic recreation, leisure, vacation and entertainment venues in the community that promote community inclusion, friendships, social networks and healthy living.</p>

**Program Success Monitored By**

Over the past 38 years, STEP has successfully provided recreation and leisure services to hundreds of adults with disabilities. STEP's success is determined each year by surveying individuals and family members about their satisfaction with the services they receive. Over the past 2 decades, annual satisfaction surveys of families and individuals have consistently indicated 97- 98% satisfaction. Most family members indicate that they are "very pleased" with the supports received; individuals receiving services are almost unanimous in their expressions of satisfaction with their supports. Individuals express pride in their homes, contentment with the opportunities available to them, and most importantly, they report that they feel respected and understood by their support staff. STEP's services are also monitored and evaluated by our funding sources.

**Examples of Program Success**

Beaverbrook STEP has strong community affiliations and partnerships that have been forged over the past 38 years. These affiliations are an integral component of promoting inclusion and helping individuals to become valued and active members of their community. For example, STEP individuals patronize local libraries, YMCA's, retail businesses and financial institutions. They also vote, advice local advocacy and housing officials and advocate with public and private providers promoting community inclusion, wheelchair accessibility and disability services.

Last year we worked with other providers to develop the Fun & Friends Connection, a web site devoted to encouraging use of community resources, sports and recreational opportunities by people with intellectual and developmental disabilities. We worked with Belmont Sports to co-sponsor a cruise for 50 of our individuals to Bermuda. Our individuals also took weekend trips, participated in sports and joined local gyms.

# Management

## CEO/Executive Director

**Executive Director**

Ms. Virginia A. Connolly LMHC

**Term Start**

Apr 1988

**Email**

vaconnolly@beaverbrookstep.org

### **Experience**

Virginia A. Connolly, Executive Director, MEd., LMHC, is a seasoned manager who has been at the helm at Beaverbrook STEP for nearly 25 years. Under her guidance, STEP has developed from a small organization providing residential services to fewer than 50 individuals into a comprehensive and highly regarded provider of residential, alternative day, employment training and family support services for 170 adults with intellectual and developmental disabilities and over 200 family members. Services have expanded to include the communities of Boston, Watertown, Belmont, Waltham, Cambridge, Arlington, Newton, Walpole, Brookline and Brighton.

The corporation employs over 345 staff, clinicians and managers who oversee services for individuals, community organizations, family members and health care providers at 37 residential sites, 2 day program sites and numerous community sites.

During her tenure, STEP has grown from a \$3 Million operation to its current annual budget of over \$11 Million. Funding sources have also been diversified to include the MA Department of Developmental Disabilities, HUD, the Mass. Rehabilitation Commission, Local Housing Authority Section 8, private fees, grants and donations.

Ms. Connolly works closely with an all volunteer Board of Directors, a highly qualified Senior Management Team, clinical and health care specialists and community volunteers. She has served on the Board of Directors of numerous housing, community and provider organizations including Watertown Community Housing, Resource Consortium LLC, Whitney Court Condominium Trust, Association of Developmental Disability Providers and New Horizons Inc. She is also an active supporter of The Arc of Mass., TASH, The Human Services Provider Council and the American Association on Intellectual and Developmental Disabilities.

For 20 years, STEP has consistently received the highest level of certification and licensing from the MA DDS Quality Assurance Office.

## Senior Staff

### **Ms. Margaret Wilson**

**Title**

Director of Finance

**Experience/Biography**

Margaret Wilson has extensive education in business accounting and over 25 years of experience as the Director of Finance at STEP. She manages a finance business team of Accounts Payable and Accounts Receivable staff and is responsible for all financial reporting, auditing, contracts and AR/AP.

**Ms. Cindi Rascher**

**Title**

Senior Director/Director of Human Resources

**Experience/Biography**

Ms. Rascher has extensive training in business administration and human resources. She began working for STEP over 20 years ago and has developed comprehensive human resource policy and procedures for STEP. She also coordinates and directs Orientation, In-Service and Annual Training for all direct care and management staff.

**Ms. Lisa Turowitz**

**Title**

Senior Director

**Experience/Biography**

Lisa Turowitz is a Senior Director in charge of one of STEP's residential modules. She has a B.A. degree and nearly 20 years of experience at STEP working as a clinician, supervisor and manager. She currently oversees all Individual Supports Services for the organization and serves as the liaison for STEP with the array of mental health clinics, psychiatrists and psychologists that serve STEP participants.

**Ms. Jessica Kirwan**

**Title**

Senior Director/Director of Employment Day Services

**Experience/Biography**

Jessica Kirwan has a B.A. in education and is currently studying for a Master's degree at U of Mass. in Boston, which will include certification in Applied Behavioral Analysis (ABA). Jessica has worked for STEP for over 10 years managing the Employment Services program and one of STEP's Residential Models. She is also responsible for self advocacy training at the organization and serves as Senior Staff Assistant for the Community Advocates Board.

**Mr. Richard Currier**

**Title**

Senior Director

**Experience/Biography**

Mr. Currier has a B.A. in education and has nearly completed work for a Master's degree in Education. He has over 15 years of experience working as a special education teacher, school principal, administrator and manager serving children and adults with behavioral needs. He has worked at STEP for 3 years and currently manages the organization's Behavioral Residential Module.



**Ms. Leslie Colligan**

**Title** Senior Director/Director of Options Alternative Day Services

**Experience/Biography** Ms. Colligan has a B.A. and nearly 25 years of professional experience managing day habilitation and alternative day program services for individuals with significant and multiple disabilities. She directs STEP's Options Alternative Day Services program. Ms. Colligan also serves as the coordinator of STEP's Human Rights Committee.

**Ms. Claire Collins**

**Title** Senior Director

**Experience/Biography** Ms. Collins has a B.A. degree and over 7 years of experience working at STEP as a supervisor and manager. As a Senior Director she is responsible for one of STEP's Residential Modules which includes the acclaimed Alzheimer's Program.

**Mr. Steven Dwyer**

**Title** Co-Director of Health Care Services

**Experience/Biography** Mr. Dwyer is a MA Registered Nurse who has over 15 years of clinical nursing experience developing and implementing complex health care plans for adults with intellectual and developmental disabilities. He is an experienced trainer and works with direct care staff, managers, specialists and family members. He also has extensive expertise working with elders with developmental disabilities.

**Ms. Diane Shepard**

**Title** Co-Director of Health Care Services

**Experience/Biography** Ms. Shepard is a MA Registered Nurse with over 8 years of clinical nursing experience working with people with disabilities. She coordinates health care services for individuals at STEP working in collaboration with direct care, supervisory, specialists and community health care providers. An experienced trainer, she provides STEP staff and managers with in-service training and specialized health care services. Prior to becoming a Registered Nurse, Ms. Shepard worked for 15 years at Beaverbrook STEP as a Senior Clinical Director.

Staff Information

<b>Full Time Staff</b>	185
<b>Part Time Staff</b>	160
<b>Volunteers</b>	50
<b>Contractors</b>	3

<b>Retention Rate</b>	92%
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### Staff Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	0
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0 340

### Staff Demographics - Gender

<b>Male</b>	0
<b>Female</b>	0
<b>Unspecified</b>	340

### Formal Evaluations

<b>CEO Formal Evaluation</b>	Yes
<b>CEO/Executive Formal Evaluation Frequency</b>	Annually
<b>Senior Management Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation Frequency</b>	Annually
<b>NonManagement Formal Evaluation</b>	Yes
<b>Non Management Formal Evaluation Frequency</b>	Annually

### Plans & Policies

<b>Organization has a Fundraising Plan?</b>	Yes
<b>Organization has a Strategic Plan?</b>	Yes
<b>Years Strategic Plan Considers</b>	2
<b>Date Strategic Plan Adopted</b>	June 2010
<b>Does your organization have a Business Continuity of Operations Plan?</b>	Yes
<b>Management Succession Plan?</b>	Yes
<b>Organization Policy and Procedures</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Whistleblower Policy</b>	Yes
<b>Document Destruction Policy</b>	Yes
<b>Directors and Officers Insurance Policy</b>	Yes

**Is your organization licensed by the Government?** Yes  
**Registration** Yes  
**Permit?** Yes

## Collaborations

Beaverbrook STEP has strong community affiliations developed over 38 years.

- Member of the Watertown/Belmont and Metro West Chambers of Commerce;
- Patron of local libraries, businesses and financial institutions; excellent local banking relationship with Watertown Savings Bank;
- Collaborates with local public and private advocacy and housing officials and agencies including local Community Housing Authorities, Commissions on Disabilities and assisted living services such as The Brigham House in Watertown;
- STEP individuals use the services offered by the Massachusetts One Stop Career Centers;
- STEP individuals work with graduate school interns in social work, psychology and counseling; and
- STEP individuals benefit from outstanding relationships and affiliations with over 60 local community organizations and foundations such as the YMCA, the Watertown Community Foundation, the Watertown/Harvard & Watertown O'Neill Foundation, Melmark New England (clinical and behavioral services), Mt. Auburn Hospital, Springwell, Inc. (previously West Suburban Elder Affairs), and the Greater Boston Visiting Nurses Association.
- Several STEP Board Directors and Managers sit on local area human service and housing Boards.

## Awards

### **Awards**

<b>Award/Recognition</b>	<b>Organization</b>	<b>Year</b>
2 Year Certification with Distinction	MA Dept. of Developmental Disabilities, Office of Quality Enhancement, Boston, MA	2010
Downtown Revitalization Retail Award 'Gifts at Peppermint Place'	Belmont Chamber of Commerce	2009

## Affiliations

<b>Affiliation</b>	<b>Year</b>
American Association on Mental Retardation (AAMR)	1988
Chamber of Commerce	1985
Massachusetts Council of Human Service Providers	1991

## Comments

### **CEO Comments**

Beaverbrook STEP is licensed to operate the following services to people with intellectual and developmental disabilities by the MA Dept. of Developmental Services: 24 hour residential services, individual support services, family support & respite care services, community based day service and employment training services. We are also an approved DDS Agency with Choice provider.

STEP is approved to provide EOHHS Supported Employment Services and MRC Employment Training and Supported Employment Services.

STEP is an approved Department of Education and DDS residential and support services provider.

# Board & Governance

## Board Chair

<b>Board Chair</b>	Mr. Stanley Kruszewski
<b>Company Affiliation</b>	Retired Housing/Development Specialist
<b>Term</b>	June 2011 to June 2012
<b>Email</b>	vaconnolly@beaverbrookstep.org

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Ms. Estelle Fox	Program Participant/Self-Advocate	NonVoting
Ms. Augusta Haydock	Vice President Bank of America	Voting
Mr. John Kennedy	Finance Specialist/Parent	Voting
Mr. Arthur Millman	Professor/UMass Boston	Voting
Ms. Shirlee Purcell	Family Member	Voting
Ms. Elaine Root	Family Member / Retired Educator	Voting
Mr. John Saunders	Transportation Specialist/ Parent	Voting
Ms. Bennette Shultz	Retired Educator/Community Volunteer	Voting
Ms. Karin Tuttle	School Psychologist, City of Boston	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	9
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	1
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	4
<b>Female</b>	6
<b>Unspecified</b>	0

## Board Information

<b>Board Term Lengths</b>	3
<b>Number of Full Board Meetings Annually</b>	8
<b>Board Meeting Attendance %</b>	85%

<b>Written Board Selection Criteria?</b>	Yes
<b>Written Conflict of Interest Policy?</b>	Yes
<b>Percentage Making Monetary Contributions</b>	90%
<b>Percentage Making In-Kind Contributions</b>	100%
<b>Constituency Includes Client Representation</b>	Yes

### Standing Committees

Audit, Compliance and Controls  
Advisory Board / Advisory Council

# Financials

## Fiscal Year

<b>Fiscal Year Start</b>	July 01, 2011
<b>Fiscal Year End</b>	June 30, 2012
<b>Projected Revenue</b>	\$11,190,745.00
<b>Projected Expenses</b>	\$11,190,745.00
<b>Endowment?</b>	No
<b>Credit Line?</b>	Yes
<b>Reserve Fund?</b>	Yes
<b>Months Reserve Fund Covers</b>	0

## Detailed Financials

### **Revenue and Expenses**

<b>Fiscal Year</b>	<b>2013</b>	<b>2012</b>	<b>2011</b>
<b>Total Revenue</b>	\$11,766,864	\$11,545,360	\$10,873,747
<b>Total Expenses</b>	\$11,596,697	\$11,215,206	\$10,502,420

### **Revenue Sources**

<b>Fiscal Year</b>	<b>2013</b>	<b>2012</b>	<b>2011</b>
<b>Foundation and Corporation Contributions</b>	--	--	\$12,000
<b>Government Contributions</b>	\$0	\$0	\$0
<b>Federal</b>	--	--	\$0
<b>State</b>	--	--	\$0
<b>Local</b>	--	--	\$0
<b>Unspecified</b>	--	--	\$0
<b>Individual Contributions</b>	\$19,809	\$47,548	\$20,667
<b>Indirect Public Support</b>	--	--	\$0
<b>Earned Revenue</b>	\$11,720,294	\$11,478,957	\$10,822,637
<b>Investment Income, Net of Losses</b>	\$5,327	\$4,852	\$7,161
<b>Membership Dues</b>	--	--	\$0
<b>Special Events</b>	--	--	\$0
<b>Revenue In-Kind</b>	--	--	\$0
<b>Other</b>	\$21,434	\$14,003	\$11,282

### Expense Allocation

Fiscal Year	2013	2012	2011
Program Expense	\$10,722,160	\$10,354,272	\$9,669,960
Administration Expense	\$874,537	\$860,934	\$832,460
Fundraising Expense	\$0	\$0	\$0
Payments to Affiliates	--	--	\$0
Total Revenue/Total Expenses	1.01	1.03	1.04
Program Expense/Total Expenses	92%	92%	92%
Fundraising Expense/Contributed Revenue	0%	0%	0%

### Assets and Liabilities

Fiscal Year	2013	2012	2011
Total Assets	\$9,864,994	\$9,957,274	\$9,696,359
Current Assets	\$2,900,436	\$2,736,234	\$2,265,359
Long-Term Liabilities	\$5,400,116	\$5,618,750	\$5,794,767
Current Liabilities	\$629,702	\$673,515	\$566,737
Total Net Assets	\$3,835,176	\$3,665,009	\$3,334,855

### Short Term Solvency

Fiscal Year	2013	2012	2011
Current Ratio: Current Assets/Current Liabilities	4.61	4.06	4.00

### Long Term Solvency

Fiscal Year	2013	2012	2011
Long-Term Liabilities/Total Assets	55%	56%	60%

### Top Funding Sources

Fiscal Year	2013	2012	2011
Top Funding Source & Dollar Amount	--	--	Mass. Mechanical Association \$6,534
Second Highest Funding Source & Dollar Amount	--	--	Watertown Community Foundation \$2,500
Third Highest Funding Source & Dollar Amount	--	--	Knights of Columbus \$2,500

### Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	Yes

### Comments

#### Foundation Staff Comments

This nonprofit's summary financial data is based on the 990s provided.