

Heroes Dream Big.

2017 Annual Report



Kristine Bostek,
President & CEO, with
Samantha McDonald,
Board Chair

CEO MESSAGE

Eight months into my first year leading this amazing agency, I find myself inspired and humbled each day by the dedication and perseverance of our staff and the resiliency of the children and families we work with. I am honored to lead this important agency into the future.

As we navigate the opportunities and difficulties of the fast-changing health care landscape, particularly around behavioral health for children and families, we are so fortunate to have this foundation of inspiration and commitment beneath our collective feet. The Board, senior leadership, employees, and I are focused on moving the agency forward thoughtfully and strategically over the next four years to arrive at our 50th year stronger than ever.

While 2017 was a challenging fiscal year, it was very strong in a variety of ways that bode well for our future path. In 2017 we:

- Achieved a near perfect accreditation from the Council on Accreditation (see pg. 4), a testament to the quality of our services
- Reorganized our programs and added talented members to our senior management team, creating a great mix of new eyes and experienced hands
- Created our [new website](#) to better tell our stories and engage families, providers, potential employees, and donors
- Started a new event, the Uphill Climb, including a new peer-to-peer fundraising effort (see pg. 5)
- Enhanced relationships with key community health care partners to navigate future industry changes collaboratively

This agency's strength comes from the combination of everyone's role—from the front line staff and counselors patiently working each day with kids and families, to the leaders who support them and the volunteers who govern the agency; from the local family foundations and their philanthropic support over the decades to the individual donors, whether first-time or recurring, who are the lifeblood of community support.

Without such support of our mission, we could not provide the many needed services to so many people, services that ensure improved health and economic conditions for the next generation. Everyone who has a role in any way in this work is a hero in their own way...yet none would claim it. So today we thank them, as well as tomorrow's heroes, too. "We can be heroes, just for one day." (David Bowie)

I am immensely proud of our mission and look forward to sharing our journey in the coming year!



Kristine Bostek
President & CEO

Meet our heroes...

▶ SUSTAINERS



Accreditation Success!



This past spring, we completed our 4-year re-accreditation process with the Council on Accreditation. The review team was extremely impressed and said how rare it is to complete a nearly perfect review: top ratings on 96% of the 1300+ standards, and passing ratings on 99.9%!

Marissa Kirshenbaum joined Dynamy Internship Year for her gap year in 2001, completing a 21-day Outward Bound expedition, three college courses, and three full-time internships (including one alongside a school adjustment counselor at Worcester's Belmont Street School). After Dynamy, she attended the University of Vermont, majoring in Sociology and Political Science. Today, Marissa works for the Council on Accreditation in New York City (though not on YOU, Inc.'s accrediting team—see sidebar).

In the year following her graduation from Dynamy, Marissa's parents **David Kirshenbaum** and **Barbara Horowitz** donated to the Dynamy Annual Fund—and have done so every year since (15 straight)! Dependable donors like David and Barbara provide a reliable foundation for us to count on. Being there every year in support of our mission makes them the best kind of everyday heroes. And sometimes they also move us in new directions, such as when David asked recently if we could set up easy recurring payments so he wouldn't have to rush yet again at year end—David, you'll be happy to see our new Set It & Forget It option!



▶ PEER₂PEER FUNDRAISERS

Betsy Cheyne is a YOU, Inc. psychologist committed to serving kids and families. For her own health she runs—sometimes pretty far! When she decided to run the half marathon at the Newport Marathon on October 8th, she decided to crowdfund (fundraise online) in support of YOU, Inc., describing it as “an nonprofit agency committed to supporting children and families by providing compassionate, individualized and quality care.” As we go to print, Betsy has just passed her goal of \$2,000 raised from her network of friends of families! To see an update on Betsy’s final total and how her half-marathon went, visit News on our new website, <https://youinc.org>

Our newest event, the Uphill Climb at Wachusett Mountain this past summer, saw us pilot supported peer-to-peer (P2P) fundraising. We couldn’t have been happier with the results, netting over \$12,600 in 30 days, mostly through social media and an average gift of just \$52. **Andrew Mahoney**, a YOU, Inc-er since 2005, raised the most P2P funds, tapping into his diverse network, including his **WAKA MA Seven Hills kickball league mates** from *Pitch Intense & The Rubber Sluggers!* Andrew tapped into his competitive streak by sharing on social media more than anyone else during the 30 days it was live. Talk about a win-win situation: Andrew got to brag that he “won” the Most Raised award, and \$1,600 went to support the kids and families of YOU, Inc.!

Set It & Forget It

Thanks to our recently completed donor software upgrade, we now offer the much-asked-for convenience of recurring donations. You can set an amount to process every month, quarter, or year. You’ll still get to hear all the wonderful outcomes and receive our thank you letter without having to worry about the process!

Just visit our new website at: <https://www.youinc.org/get-involved/donate/>

▶ CORPORATE CONTRIBUTORS

Without major contributions of the business community through the years we wouldn't be able to sustain and grow our services. And in the truest meaning of community, many of this past year's contributors also engaged their employees in our events and programming, underscored by these two stories.



As a Central Massachusetts company, **Fallon Health** is deeply engaged in the same areas that we operate our services in, and they support many worthwhile endeavors to improve the overall health of our community. Our annual Gala for Kids is our major fundraising event each year, and for the past few years, Fallon Health has been the major sponsor of it, filling tables and bringing excitement to the event. When we launched our new summer fundraiser, the Uphill Climb, they also jumped in and sent a team to climb the mountain with us!



Before dropping their first puck, the **Worcester Railers Hockey Club** made an immediate impact in supporting youth programs, including ours. The Railers organization has supported all of our events and worked with us on a calendar for the coming year to host many of our youth and families not only at games but also with skate time at the Fidelity Bank Worcester Ice Center. Through their partnership with **Hanover Insurance Foundation**, tickets to their inaugural season were supplied for kids, families, and staff, with a Draft kickoff event held recently.

Thank you to all our
corporate contributors!

\$10,000 & Above:

Fallon Health
Risk Strategies
TJX Foundation

\$5,000-\$9,999

Fletcher Tilton PC
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Hanover Insurance Foundation
Metso Automation
TD Bank Charitable Foundation
UniBank

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Gifts in Kind:

Creedon & Co.
Curry Printing
Pagano Media
S&S Deli & Farms
Wachusett Mountain
Worcester Business
Journal



YOU, Inc. staff pose for their official team photograph before rowing the Worcester Railers HC sponsored boat at the inaugural Worcester Dragon Boat Festival



At our Cottage Hill Academy, the staff, led by **Patti Ellis**, had been fundraising in a variety of ways (yard sales, concessions at Gillette Stadium, etc.) for a few years to build the kids and teens there a playground, one of the only things the campus was missing. As they closed in on their goal they needed one last major gift to make it a

reality: enter **John Cook**. John not only wrote the final check, but his family's company, **CedarWorks**, was also able to install an inspirational castle-themed playground. Now it is a calm and fun gathering place for the kids, and a symbol of hope made reality as one comes up the hill to campus.



► BUILDERS

How does a conversation at the gym lead to a new playground for young kids living in a group home? When “so tell me about your work” is between passionate employees, **Santino Simone** and **Julio Valentin**, and a caring philanthropist, **Scott Glass**. Scott, an avid “gym rat”, wanted to help the kids have an exciting outdoor space to play in, so that fresh air and physical activity could be the norm for them. Now, thanks to a major gift from the **Glass Family Foundation**, we’ll cut the ribbon on a new playground (middle right image) at our latency group home this November!

75% of the kids discharged from the latency group home have remained with their families without additional out-of-home placements or hospitalizations!



▶ PLANNED GIVERS

“Not all heroes wear capes.”

Planned giving is not just estate planning. An option gaining in popularity is to set up a donor-advised fund, such as those at Greater Worcester Community Foundation, or to gift a mutual fund. For more information please contact Fred Kaelin, Chief Development Officer, at kaelinf@youinc.org or 508.849.5600.



George Bernardin was a long-time advocate for YOU, Inc. serving as a friend, donor, and volunteer, including as President of the Board of Directors from 1979-1981. In 1990, we dedicated the George F. Bernardin Oxford House, a group home that assists adolescent boys who require long-term care. George also stepped in to serve on the critical strategic committee for Dynamy that led to its 2009 merger with YOU, Inc., and was one of the first members of the Greenwood Society along with his wife, **Barbara**. We remain eternally grateful for George’s dedication to our agency and to the youth of our community. While greatly missed, his legacy endures.



Nancy Joy Brown was involved at the earliest moments of YOU, Inc. as a member of a citizen group who helped create the Worcester Juvenile Court. A year later they incorporated Youth Opportunities Upheld, Inc. as an arm of the court with Intensive Juvenile Probation as the first program. Today, as part of the Greenwood Society, Nancy also plans to be a part of our future by someday sharing part of her estate in support of continuing our mission. Thank you, Nancy, and all our planned givers!

▶ FOUNDATIONS & TRUSTS



Greenwood Society

The Greenwood Society recognizes those who have named YOU, Inc. as the beneficiary of a bequest or other planned gift (estate plan, donor-advised fund, etc.). The name honors founding executive Maurice (Moe) Boisvert: bois 'wood' + vert 'green' in Old French.

George* & Barbara Bernardin
 Maurice & Pamela Boisvert
 Nancy Brown
 Stephen Cahn*
 Sarah Carey
 Robert Dik*
 Stephen & Janet Erickson
 Edith & Conrad* Fisher

Charles Genovesi
 Thomas & JoAnne* Jenkins
 Janet & Art* Jones
 Sally Kimball
 Stephen & Valerie Loring
 Mary Lorusso-DiBara
 Amy & Christopher McCarthy
 Mary Elizabeth McGrath

Douglas & Diane Meystre
 Jonathan & Kristine Miller
 Laurance Morrison
 Thomas & Kathleen Sullivan
 Polly & Dick* Traina
 Bruce & Kate Wells
 Todd Wetzel

The Worcester family foundations and trusts are pillars of Central Massachusetts, and their efforts to support our work and the critical work of so many other non-profits are nothing short of heroic. And none have supported us more throughout our history than **The Alden Trust** and the **Stoddard Charitable Trust** with a combined 3.6 million dollars over the past 20 years in both operating and capital support.

Thank you to these Trusts and to all the other foundations who have supported us this year:

\$30,000+: United Way of Central MA

\$25,000: DCU for Kids, The George W. Wells Foundation

\$20,000: Glass Charitable Foundation

\$15,000-\$19,000: Fallon/OrNda Comm. Health Fund of GWCF, George F. & Sybil H. Fuller Foundation, Taft Charitable Trust (Bank of America-U.S. Trust)

\$10,000-\$14,000: The Fletcher Foundation, Greater Worcester Community Foundation, Heywood Healthcare Charitable Foundation, Inc., Ruth H. and Warren A. Ellsworth Foundation, Stoddard Charitable Trust

\$2,500: Wyman-Gordon Foundation

▶ OUR DONORS

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Justin & Laine Fletcher

President's Club (\$1,000-\$4,999)

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of GWCF
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Champions of Youth (\$500-\$999)

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Advocates of Youth (\$250-\$499)

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The Publick House
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Tommy Lee
William P. Bessolo
Wonderful Giving

We thank you.

We value contributions of any kind or amount—thank you to all our supporters. Finally, we strive for accuracy, but if you see an error or omission, [please contact us](#).

▶ OUR DONORS

Supporters of Youth (\$50-\$249)

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Amazon Smile

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Linda Armstrong

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Beth Barto

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Michele Blackburn

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Diamond Is The Sky

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Williamsburg

First Congregational Church of Boylston

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Falmouth

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Marlborough

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Melrose

Flagg Street School

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Connie Flieger & Gene McMahon

Charles T. Genovesi

Good As Gold Coffee

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Meg Granger

Tatiana Gray

David Hamolsky

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Cheryl Hatch

Russ Hatch

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Paul Krasowsky

Peter Lanyon

Lisa Lashbrook

Sarah Latorre

Nicole Latsis

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Paul Lee

Francyne & Stephen Lefemine

Letourneau Property Maintenance

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Jennifer Long

Stephen & Valerie Loring

Gary MacConnell

Stewart MacDonald

Sharon Mahoney

Alan & Mary Malkasian

Jesse Marrow

Alexandra Martin

MassDevelopment

▶ OUR DONORS

Supporters of Youth (\$50-\$249)

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Oakmaster McFlash
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Dwayne Williams
Mark Wojcicki
Worcester Business Development
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Worcester Rotary Club
Melissa Young

We thank you.

We value contributions of any kind or amount—thank you to all our supporters. Finally, we strive for accuracy, but if you see an error or omission, [please contact us](#).

▶ OUR DONORS

Gifts in Kind

Abbey Villa Soccer Camp
Adventure Park Storrs
Paula Aiello
Alexander's Golden Greek
Alexis Grace Consignment Boutique
Bien Cuit (NY)
Big Bunny Market, Inc.
Big Y Foods, Inc.
Birch Tree Bread Company
David Black
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Boston Celtics
Bravehearts
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Crossfit 1977
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Dance To Live Foundation
Discovery Museums
Disney
Ecotarium
Enlightened Interventions
Bill Filsinger
First Congregational Church of Walpole
Flying Rhino
Fox Tours

Gateway Players
Good As Gold Coffee
Great Wolf Lodge
Hanover Insurance Group Foundation
Hanover Theatre
Harrington Outpatient Behavioral Health
Harrington Self Wellness
Healthy Families of So. Worcester County (WCAC)
Herbert & Berg
Kristina Horgan
Jacob Edward Library
J'Adore Salon
Kay Jeweler
Jillian's of Worcester
Laser Craze
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Mane Creations
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McDonald's
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New York Mets
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The French Bouquet
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Wal-Mart - Southbridge
Wegman's
Worcester Railers
Worcester Regional Transit Authority
Wormtown Brewery
YMCA - Southbridge
Zoe's Pizza and Seafood

We thank you.

▶ OUTCOMES

All the support highlighted in these pages (and beyond them) leads to important outcomes in the lives of children and families. Here are just a few.

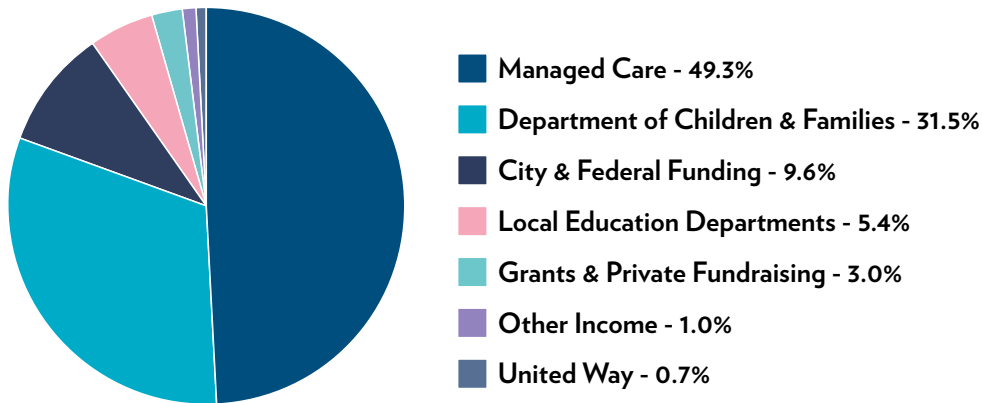
- **100% of graduates in our College Success programs began college this year!**
- **Career Pathways enrolled 100 students, providing over 200 hours of community service, 24 paid Work Experience opportunities, and 50 HiSET/NRFF certificates!**
- **Clinical outpatient and out-of-home services show significant symptom improvement on a scientific measurement tool compared to national averages!**
- **YOU, Inc. serves as the Community Service Agency (CSA) for the South Central/Blackstone Valley area of Central Massachusetts. We support families with children with serious emotional disturbances. In 2017 the CSA worked with 140 families and graduated 43 from the program!**
- **On over 1100 surveys, 95% of consumers were satisfied with their overall experience at YOU, Inc.!**



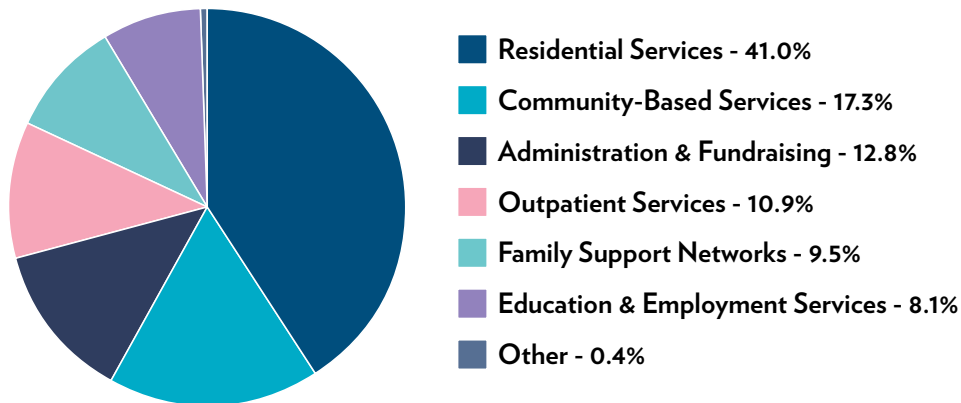
▶ OUR FINANCIALS

Youth Opportunities Upheld, Inc.
 FY 7/1/16 - 6/30/17* Unaudited

OPERATING REVENUE - \$33,874,890



OPERATING EXPENSES - \$35,450,249



ASSETS

| | |
|-------------------------------------|----------------------------|
| Cash | \$924,708 |
| Prepaid Expenses | 635,625 |
| Accounts and other receivables, net | 3,197,908 |
| Investments | 2,474,922 |
| Beneficial Interest in Trust | 1,012,416 |
| Other Assets | 315,737 |
| Property, Plant and Equipment | |
| Buildings | 10,883,592 |
| Furniture and Equipment | 1,883,989 |
| Building Improvements | 3,099,190 |
| Sub-Total | <u>15,866,771</u> |
| Less Accumulated Depreciation | <u>(9,832,671)</u> |
| Net Property, Plant and Equipment | 6,034,100 |
| Total Assets | <u>\$14,595,416</u> |

LIABILITIES

| | |
|-------------------------------------|--------------------|
| Note Payable and Hedging Instrument | \$7,634,930 |
| Accounts and Subcontracts Payable | 463,666 |
| Deferred Revenue | 265,060 |
| Accrued Liabilities | <u>1,559,773</u> |
| Total Liabilities | \$9,923,429 |

NET ASSETS

| | |
|---|----------------------------|
| Unrestricted Fund | 4,302,609 |
| Temporarily Restricted | 208,378 |
| Permanently Restricted | <u>161,000</u> |
| Total Net Assets | 4,671,987 |
| Total Liabilities and Net Assets | <u>\$14,595,416</u> |

| | |
|---------------------------------------|-------------------|
| Operating Support and Revenue | \$33,874,890 |
| Operating Expenses | <u>35,450,249</u> |
| Changes in Net Assets from Operations | (1,575,359) |

Non-operating Revenue (Expenses)

| | |
|---------------------------------------|---------------------------|
| Net Investment Return | 505,910 |
| Unrealized Loss on Hedging Instrument | <u>392,259</u> |
| Changes in Net Assets | (677,190) |
| Net Assets, Beginning of Year | <u>5,349,177</u> |
| Net Assets, End of Year | <u>\$4,671,987</u> |

▶ OUR LEADERSHIP



Senior Management Team

President & CEO
Kristine Bostek

Chief Operations Officer
Paul Kelleher, LICSW

Chief Financial Officer
Paula Aiello, CPA

Medical Director
Ludmilla Tonkonogy, MD

Chief Quality & Compliance Officer
Elaine Waters-Daverio, LMHC

Chief Development Officer
Fred Kaelin

Chief Information Officer
Jonathan Miller

Director of Human Resources
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Director of Community-Based Services
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Kristin Mayotte, MA

Director of Outpatient Services
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Mary Roy, Quaker Special Risk
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Donna Truex, Bowditch and Dewey LLP

▶ STRATEGIC PLANNING

FORWARD TO FIFTY

As we move forward from 2017, a year that saw positive program outcomes and a stellar reaccreditation process combined with disappointing financial results, we are completing a strategic plan to chart a course to be even stronger in each year until the agency turns 50 in 2021.

In early 2018, we will publish that next strategic plan, Forward to Fifty, which will be a living document with goals and action plans to evolve YOU, Inc. successfully in the new landscape we inhabit today. However we evolve, we will always be mission-focused on supporting and caring for children and families, imparting hope, and helping youth have opportunities for brighter futures.

To be successful, we need everyday heroes throughout our community to support us. We need you, just for one day.



**Every child
needs a hero.**

“We do not have to become heroes overnight.
Just a step at a time, meeting each thing that
comes up...discovering we have the strength
to stare it down.”

– *Eleanor Roosevelt*



81 Plantation Street | Worcester, MA 01604
508.849.5600 | youinc.org