



NextGen
SYNERGY



Board of Directors **Annual Report**

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June 2026

FY26 Year in Review | FY27 Strategic Preview

FY26: *The Year We Built the Foundation and Proved the Model.*

FY 27: *The Year We Scale the Impact.*

Executive Summary

FY26 marked a transformational year for NextGen Synergy. It was the year we moved from vision to execution—building, testing, and validating a scalable model designed to strengthen the capacity of providers, clinicians, people with lived experiences, direct support professionals, families and organizations serving people with intellectual and developmental disabilities and co-occurring mental health conditions.

Through strategic partnerships, workforce development initiatives, clinical capacity-building efforts, and national thought leadership, NextGen Synergy expanded its reach and influence across the field. The organization generated an anticipated \$1.1 million in revenue, grew the Synergy Pass network to more than 600 members across Maryland, Virginia, Washington, D.C., Pennsylvania, Oregon, Missouri, South Dakota, and beyond, and represented the organization at more than 15 national and regional conferences as presenters, exhibitors, and invited keynote speakers.

A significant milestone of FY26 was the development and soft launch of HealthStrata™ MSO, a management services organization powered by NextGen Synergy. HealthStrata™ was created to provide the infrastructure behind care—supporting providers through administrative, operational, compliance, and workforce development services that strengthen clinical practice and expand access to quality care.

As we enter FY27, NextGen Synergy is positioned for strategic expansion. The focus shifts from building the foundation to scaling impact—deepening our national presence, strengthening organizational infrastructure, expanding HealthStrata™ MSO, and investing in the people, systems, and partnerships necessary to ensure long-term sustainability.

This report highlights FY26 accomplishments, reviews organizational and financial performance, and outlines the strategic priorities and investments that will guide the next phase of growth and mission impact.

Building a Movement. Sustaining the Work.

FY26 Year in Review

BY THE NUMBERS



Projected FY26 Revenue
\$939K through April 30



600+
Synergy Pass Members
MD, VA, DC, PA, OR, MO,
SD & beyond



40+
Partner Organizations
national reach



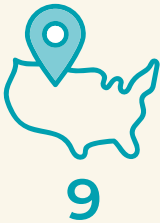
5
Active Service Lines
Pass, LMS, ECHO,
Consulting, MSO



15+
Conferences & Events
presenting, tabling,
or invited keynote



HealthStrata™ MSO
Soft launch FY26



9
States Represented
MD, VA, DC, PA, DE, OR, MO,
SD, CA, and growing



15+
CEU/CME
Hours Issued



40+
Learning Events Hosted
webinars, ECHOs,
SME series, trainings



FY26 MILESTONES & MOMENTUM**Building Capacity for the Future: The HCBS**

Provider Resiliency Cohort - NextGen Synergy designed and prepared a six-month leadership and operational capacity building initiative to increase compliance, workforce, and sustainability challenges facing providers organizations. By year end faculty and guest faculty were confirmed, the curriculum and implementation manual developed, and the workbook /syllabus was nearing completion. Seven Maryland provider organizations have already expressed interest, with a target cohort of ten agencies for the September 2026 launch. The initiative is further strengthened by the participation of MACS CEO Laura Howell as guest faculty.

Expanding Clinical Infrastructure: HealthStrata™ MSO FY 26 marked the soft launch of HealthStrata™ MSO, the Clinical Management Services Organization powered by NextGen Synergy. Developed to provide the infrastructure behind care. HealthStrata™ offers administrative, operational, compliance, workforce development and practice support services designed to strengthen provider capacity and expand access to quality behavioral health services. The MSO enters FY26 with projected revenue exceeding \$300K in FY27 and serves as a foundational strategy for long term growth and sustainability.



HealthStrata MSO™

Powered by NextGen Synergy

**Advancing National Thought Leadership—**

NextGen continued to elevate its national presence in more than 15 Conferences, forums and professional events as presenters, exhibitors, facilitators and invited Keynote speakers. A highlight of FY 26 was the MACS DSP and Front-line Supervisor Conference plenary presentation, **“No Permission Needed: Own Your Path in Direct Support,”** presented by Nick Burton and Dr. McCall (May 2026). Through these engagements, NextGen continued to influence conversations related to workforce development, leadership, behavioral health, and support for people with intellectual and developmental disabilities and co-occurring mental health conditions.

Strengthening Workforce Development through Learning Innovation—Synergy Institute Learning Management System

providing the foundation for scalable education, workforce development and professional credentialing opportunities. In addition, the DSP Nexus Workforce Development Pilot, funded through the Maryland Department of Labor, has successfully launched and is actively underway. Together these initiatives position NextGen as a leader in workforce development and capacity building across the disability services industry.

Growing Community & Passholder Member Engagement.

NextGen continued to expand opportunities for learning, networking, and community-building among members, partners, and stakeholders. FY 26 engagement activities included:

- Two Passholder Member Meetings
- A Four- Day Trauma-Informed Care Train-the-Trainer Intensive with Dr. Karyn Harvey
- “An Evening with Russell Lehmann” (June 24) featuring a keynote presentation and book signing in partnership with The Arc Northern Chesapeake Region.
- The Second Annual NextGen at the Ballpark event (June 26) held during Pride Night at Camden Yards

These events strengthen relationships, increased visibility, and reinforced NextGen’s commitment to creating meaningful spaces for learning, connection, and advocacy.

**Clinical & Behavior Support Group Launching.**

NGS is launching a dedicated peer learning and consultation group established to support provider partners, strengthen clinical capacity, behavioral support, and advance best practice in supporting people with IDD and co-occurring mental health conditions.

Revenue Growth and Diversification Projected

FY 26 revenue exceeded 1.1 million, driven by consulting, workforce development, grants, training, and strategic partnerships, positioning NextGen Synergy for continued growth and expansion in FY27.



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FY26 & FY27 REVENUE SNAPSHOT

- 1.1 Mil Project Revenue
- Revenue Diversification and Expanded Revenue Portfolio
- Membership Revenue Growth \$310K in total Passholder Revenue (\$275K Synergy Pass + \$35K Pro/Student Pass in FY27)
- +38% Consulting Growth: \$705K in FY26 growing to \$975K budgeted in FY27
- Multiple Revenue Streams Established—new revenue streams introduced: Donations, Professional Pass, and Student Pass
- Grant and Strategic Investment Success with State and National Funding Partnerships
- Earned Income Strength \$1.43M total NGS Nonprofit FY27 base budget
- New Revenue Platforms Launched- Resilience Cohort, HealthStrata™MSO
- 9 States Reached
- Workforce Development and Capacity Building Initiatives—DSP Nexus, The Arc US
- LMS Platform
- Associations Memberships



FY27 Strategic Priorities: An Evolution from Building to Scaling; From Opportunity Driven Revenue to Strategic and Sustainable growth

FY 27 NGS SUCCESS STATEMENT

By the end of FY27, NextGen Synergy will have strengthened its organizational infrastructure, expanded recurring revenue streams, launched new capacity-building initiatives, enhanced governance, and positioned itself for sustained growth and national impact.

FY 26 proved the model; FY27 is the year NextGen Synergy transitions from building the foundation to scaling sustainable impact. We stop being a “contractor dependent” operation and become the kind of organization built to last. The organization is intentionally investing in infrastructure, recurring revenue, leadership capacity, and strategic partnerships. Each priority below strengthens the long-term stability, expands our reach, increases our ability to serve providers, clinicians and communities nationwide. Each priority below reflects a deliberate investment in infrastructure, reach, and sustainability.

01

LAUNCH THE HCBS RESILIENCY PROVIDER COHORT

Successfully launch the inaugural six-month HCBS Resiliency Cohort 1 which begins September 2026. We are targeting 10 provider agencies with 7 already expressing interest and one confirmed. The cohort is a 6-month HCBS compliance and sustainability program structured across 6 phases, with bi-weekly sessions and four audience tracks: Senior Leadership, QA/ Compliance, Program, and Finance. Pricing is \$15K for Synergy Pass Holders and \$20K for non-Pass Holders.

02

SCALE HEALTHSTRATA™ MSO

HealthStrata™ MSO moves from soft launch to active in FY27. Dr. McCall leads this project nationally. Projected revenue is approximately \$400K. The primary objective is to establish the operational, clinical, and administrative support needed to strengthen provider capacity, improve service delivery, and create a scalable platform for future growth. This entity expands NGS's clinical footprint and community capacity and is projected to become a significant recurring and a cornerstone long-term growth strategy.

03

INVESTING IN OUR TEAM -INFRASTRUCTURE AND ORGANIZATIONAL CAPACITY

The single biggest strategic shift from FY26 to FY27 is the development of our internal team. NGS is adding five positions: Director of Growth and Learning (July), Director of Operations and Projects (August), Community and Partnerships Manager (July), Director of Partnerships (July), and Executive Assistant (September). This moves us from a heavily contractor-dependent model to a team-led organization. Our focus shifts to building a scalable internal infrastructure capable of supporting multiple service lines and national expansion.

04

GROW THE PASSHOLDER MEMBERSHIP AND NETWORK

We intend to expand synergy pass membership nationally by increasing organizational and individual participation, strengthening member engagement, and enhancing the value proposition through exclusive learning opportunities, communities of practice, technical assistance, and professional development resources. NGS currently holds 600+ Synergy Pass members across MD, VA, DC, PA, OR, MO, SD, and beyond. FY27 targets continued growth beyond that baseline with new Professional Pass (\$250/yr) and Student Pass (\$75/yr) tiers opening two major audience segments not previously accessible.

05

ADVANCE NATIONAL REACH AND STRATEGIC PARTNERSHIPS

Increase NextGen's visibility and influence through national presentations, publications, strategic partnerships, and collaborative initiatives that advance best practices in supporting people with intellectual and developmental disabilities and co-occurring mental health conditions.

06

EXPAND GRANT & PHILANTHROPY STRATEGY

\$75K in grants is budgeted for FY27, with \$50K already received. NGS is also launching its first-ever \$20K donations line. Foundation relationships are actively in development as NGS builds a diversified philanthropic revenue stream for the first time. Strengthen NextGen Synergy's capacity to secure grant funding, sponsorships, and philanthropic investments that advance innovation, workforce development, clinical capacity-building, and systems change initiatives. Focus on cultivating strategic funding partnerships, increasing grant readiness, and diversifying funding sources to support both program growth and long-term organizational sustainability.

07

STRENGTHEN BOARD DEVELOPMENT & BUSINESS ADVISORY COMMITTEE

FY27 brings structured investment in governance. We will be intentional in recruitment of legal and financial expertise for the board of directors' development and growth. We will launch and operationalize the NGS Business Advisory Committee to provide expertise, industry insights, business development support, partnership opportunities and strategic guidance as the organization continues to grow and diversify its revenue streams. Continue with intentional recruitment of legal and financial expertise for the board of directors.

08

STRENGTHEN FINANCIAL SUSTAINABILITY

Continue diversifying revenue through consulting, workforce development initiatives, grants, sponsorships, HealthStrata™ MSO, Synergy Pass memberships, and strategic partnerships while building organizational reserves and strengthening financial stewardship.



FY27 Team Investment

The largest single shift from FY26 to FY27 is the team. We are evolving from a primarily project-based contract model to a more sustainable and recurring model, pairing an internal leadership structure purpose-built to execute at scale with continued project-based and contractual partnerships.

CONTINUING LEADERSHIP

- Nick Burton, MPA — Co-CEO
- Dr. Monica McCall — Co-CEO
- Katie Dempsey — COO

NEW POSITIONS IN FY27

- Community and Partnerships Manager (FT) — July 2026
- Director of Growth and Learning (FT) — July 2026
- Director of Partnerships (FT) — July 2026
- Director of Operations and Projects (FT) — August 2026
- Executive Assistant (PT) — September 2026

What's Coming in FY27

NGS SIGNATURE EVENTS

- Annual NextGen Summit: National Thought Leaders & Field Engagement ("An Evening with Russell June 24,2026)
- NextGen at the Ballpark (June 26, 2026)
- National Conference Presentations & Keynotes

RECURRING MEMBER AND COMMUNITY ENGAGEMENT

- Bi- Annual Synergy Passholder Meetings
- Seasonal Subject Matter Expert (SME) Series
- Monthly NGS Synergy Institute Releases
- Community Learning Circles
- Behavior Support/Clinical Support Group
- Monthly Project ECHO™ Learning Communities
- Monthly Arc USA Chapters Learning Circle



FY27 Quarter-by-Quarter Outlook

ANNUAL Q1 FY27 (SUMMER/FALL)

- Resiliency Cohort 1 launches in September. Seven agencies expressing interest with a goal of ten. The six-month HCBS compliance journey begins.
- Personnel onboarding: the Community and Partnerships Manager, Director of Growth and Learning, and Director of Business Development onboard in July. The Director of Operations & Projects onboards in August. The Executive Assistant joins in September.
- The Business Advisory Committee is fully launched with legal and financial expertise.

Q2 FY27 (FALL/WINTER)

- NADD 2026 Annual Conference: NGS presenting across all five pillars (Regional Trainings, Synergy Institute LMS, Project ECHO, DSP Nexus, and HealthStrata™ MSO).
- HealthStrata™ MSO moves from soft launch to active provider partnerships.

Q3 FY27 (WINTER/SPRING)

- Resiliency Cohort 1 completes its six-month HCBS compliance journey.
- Planning begins for additional Resiliency Cohorts using lessons learned from the inaugural cohort to strengthen content, recruitment, and implementation.

Q4 FY27 (SPRING/SUMMER)

- Membership growth strategies are assessed and refined, with continued expansion of Professional Pass and Student Pass enrollment.
- Leadership reviews FY27 performance, evaluates revenue diversification progress, and finalizes strategic priorities and budget assumptions for FY28.
- Board development and Business Advisory Committee efforts mature into a stronger governance structure that supports long-term organizational growth.

Taken together, this FY27 outlook reflects a year focused on disciplined growth, stronger infrastructure, and intentional investment in the systems, people, and partnerships that will sustain NextGen Synergy's mission over time.

Building a Movement. Sustaining the Work.