Quality Trust Annual Report
October 1, 2016 – September 30, 2017

Outreach: Quality Trust’s community outreach is designed to ensure people within our community can learn about and access the resources, information and expertise at Quality Trust. We partner with local schools, government agencies and other community organizations on educational and resource sharing events. Some of our activities this past year include:

- Provided over 30 educational parent sessions reaching over 400 families
- Provided outreach and advocacy supports to 60 LAC families
- Served as a member of the core planning group for the DC Supporting Families Project
- Translated into Spanish and provided materials to over 160 people
- Supported over 35 youth with advocacy supports and intervention (under 21)
- Participated in over 20 community and resource events.

Monitoring and Advocacy: Quality Trust’s monitoring and advocacy work is staff by a team of 8 dedicated professional advocates with many years of direct experience supporting people with developmental disabilities to live good lives. These professionals monitor life circumstances for adults receiving services by making individual monitoring visits to their homes and reviewing reports that we receive about incidents in their lives. Most notably this year, we assumed full responsibility for independent monitoring after the conclusion of the Evans litigation in January 2017. Some highlights of our work this year include:

- Provided advocacy for 77 people with outcomes that included, residential moves, improved healthcare, increased communication between families and providers, change of day programs, help with benefits
- Conducted individual monitoring assessments for 174 people
- Received and reviewed 1238 Incidents
- Made 74 follow up visits to people related to concerns or changes in care circumstances

Legal Services: Quality Trust’s Legal team of two are well respected sources of high quality legal advice for people with disabilities and their families. QT attorneys participate in many of our outreach and education activities and are available for
individual consultation on specific legal concerns. They also work with our non-legal professionals to strategize about how to solve problems and when issues may need referral to an outside attorney. They have developed specific expertise in the area of guardianship and decision-making that they use for helping individuals and families as well as shaping policy and practice in DC. In the last fiscal year, the QT Legal Team:

- Provided legal services in over 400 matters affecting DC residents with disabilities.
- Conducted 20 trainings in DC on issues involving guardianship and alternatives to over 440 attendees, under our DCBF-funded JHJP project.
- Participated in the DDS Mortality Review Committee and reviewed 40 investigations.

**National Resource Center on Supported Decision-Making:** Quality Trust is the lead organization on a project of national significance focused on supported decision-making for adults with developmental and other disabilities and people who are aging. We have successfully completed 3 years of this grant to create and sustain the virtual National Resource Center on Supported Decision-Making [www.supporteddecisionmaking.org](http://www.supporteddecisionmaking.org). We have successfully changed the conversation about how to support people needing assistance in life decision-making with our research partners from Kansas and Syracuse Universities and partners at Parent to Parent USA, Family Voices, Autistic Self Advocacy Network and the American Bar Association. We are also supporting 5 projects throughout the country to make changes in their local communities. Year four began in September and we look forward to intensifying our focus on changing day to day support practices. During the last fiscal year, NRC-SDM conducted over 80 presentations at various conferences and other locations throughout the country.

**Beyond Guardianship: A Report from the National Council on Disability (NCD):** We worked closely with NCD over the past year to review literature, collect data and synthesize findings into a report that examined the impact of guardianship on people with disabilities. The findings of this report were The report was reviewed and approved by the Council this fall and should be available in early 2018.

- Completed a comprehensive review of literature
- Developed and implemented a qualitative research study
- Conducted 46 interviews
- Worked with the Temple University Institute on Disability to ensure study integrity and analyze results.
- Assisted NCD with report writing and editing.

**Life Span Supports Project:** We successfully completed year one of our Life Span Supports Project which is focused on assisting youth and their families to plan and
prepare for transition from school to adult life. Year two began in September and was quickly followed by the launch of our educational series for families “What you need to know about…”. The initial sessions have been well received and

**Financials:** Quality Trust was established in 2001 during class action litigation that provided an initial endowment payment and start up funding. Most of our annual funding today is provided by the interest from this investment fund. Since 2014, we have been steadily decreasing the reliance on our investments through grants, contract work and engaging corporate and individual donors as funding partners. We are pleased to report that our investment fund remains strong at the end of our fiscal year at over 19 million dollars.
# QUALITY TRUST FINANCIAL SUMMARY
## OCTOBER 1, 2016 - SEPTEMBER 30, 2017

## ASSETS

<table>
<thead>
<tr>
<th>Current Assets:</th>
<th>September 30, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$1,766,315</td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>0</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>73,781</td>
</tr>
<tr>
<td>Accrued Interest and Dividends</td>
<td>3,108</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>40,881</td>
</tr>
<tr>
<td>Other current assets</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total current assets</strong></td>
<td><strong>$1,884,085</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property and Equipment:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
</tr>
<tr>
<td>Furniture</td>
</tr>
<tr>
<td>Computer equipment</td>
</tr>
<tr>
<td>Leasehold improvements</td>
</tr>
<tr>
<td><strong>Less accumulated depreciation</strong></td>
</tr>
<tr>
<td><strong>Net fixed assets</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Assets:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments</td>
</tr>
<tr>
<td>Pledge receivable - long term</td>
</tr>
<tr>
<td>Deposits</td>
</tr>
<tr>
<td><strong>Total other assets</strong></td>
</tr>
</tbody>
</table>

| **Total Assets:** | **$19,615,146** |

## STATEMENT OF ACTIVITIES

### Revenues:

- Contributions & Grants $577,925
- Interest and Dividends 2,346,224
- Rent Reimbursement 38,439
- Other revenue 260,925

**Total Revenue:** $3,223,513

### Expenses:

- Personnel compensation & benefits $1,781,248
- Occupancy 172,585
- Consulting fees 473,043
- Operating expenses 230,833

**Total Expenses:** $2,657,703

Change in net assets: $565,804

### Net Assets:

- Unrestricted 8,091,702
- Temporarily Restricted 11,084,944

**Total net assets:** $19,176,646

### LIABILITIES AND NET ASSETS

#### Current Liabilities:

- Accounts payable and accrued liabilities $97,529
- Accrued salaries and related benefits 128,048
- Security deposit payable 0
- Deferred revenue 0
- Deferred tenant allowance 19,420

**Total current liabilities:** $244,997

#### Long-Term Liabilities:

- Deferred rent 65,655
- Deferred tenant allowance 127,848

**Total long-term liabilities:** $193,503

**Total Liabilities:** $438,500

#### Net Assets:

**Total assets:** $19,615,146

**Total Liabilities and Net Assets:** $19,615,146
Donors – Thank You for your contributions and support. You help us make a difference!
Quality Trust Fiscal Year: October 1, 2016 – September 30, 2017

**Individuals**
Sarah Allard
Alison Arrington
Karlyn Barker
Jay Batista
Nicholas Batista
James Beadle
Rhonda T Blake
Lawrence Blasko
Pier Broadnax
Todd Bromberg
Jessica Bronson
Amy Brooks
Susan Burdette
Nicholas Campanella
Tina Campanella
Maedi Tanham Carney
Kim Chavis
Courtney Clark
Richard Clark
Rebecca Clayton
Bernard Crawford
Sondra Cunningham
Donald Dearie
Donald Dell
Robert Dinerstein
Arielle Dorros
Vijay D'Souza
Jerry Ellis
Antonia Fisher
Rosalind German
Jeanne Goldberg
Michael Goodyear
Lisa Greenman
Carol Grigsby
Frances Grigsby
Lenneita Haigler
Quintina Hampton
Frances Hampe
Abby Harvey
Phyllis Holton
John Howard
Denise Hyater-Lindenmuth
Leroy Jackson
Beth Jarrett
Erik Jones
Nicole Jorwic
Arlene King-Berry
Ben King
Robyn King
Susie King
Chris Korin
James Lee
John Leinberger
Jimi Lethbridge
Christine Loo
Clark T. Madigan and Karen L. Davis
Charlie Mahone
Jonathan Martinis
John Matelis
Lisa Matthews
Yolanda Mazyck
Kathy Mitchell
Lori Mitchell-Keller
Nathalie Mizelle-Johnson
Ryan Mossbarger
Rebecca Musser
Chigor Ndukwe
Jeff Nelson
Patricia Nobbie
Michael Orleans
Ian Paregol
Germaine Payne
Renata Pereira
Chase Phillips
Mirka Picone
Yolanda Plummer
Steven Powe
Andrew Reese
Catherine Robertson
Victor Robinson
Denise Ross
Vincent Russo
Rebecca Salon
Curtis Schehr
Carrie Singer
Elver Ariza Silva
Rhoda McLeese Smith
Kristina Southerly
Kathryn Speakman
William Stewart
Lauren Swan
Shahnaz Tabibi
Ernestine TEBong-Spreemann
Angelo Telesford
Ricardo and Donna Thornton
William Thornton
John Wang
Daniel Weinberger
Molly Whalen
Morgan Whitlatch
Lindsey Wilkes
Bob Williams
Mark Wurzbacher
Tiffany Yuille

**Foundations**
DC Bar Foundation
Leder/Greenman Foundation

**Government**
Department of Aging and Disability Services
Department of Health and Human Services
Department of Justice
Mayor’s Office on Latino Affairs
National Council on Disabilities

**Companies/Community Organizations**
[solidcore]
5606 Nail Spa
Anacostia Playhouse Theater
ANCOR
Arena Stage
Avalon Theater
Baked and Wired
Barrel Oak Winery
Bibiana
Big Cork Vineyards
Blue 44
Bradford Portraits
Buddy’s Crabs and Ribs
C2 Technologies
CareFirst BlueCross BlueShield
Capital Grille
Chatter DC
Chef Geoff’s/L’IA’s
Chevy’s Fresh Mex
Comcast
Community Catalyst
Courtyard Marriott Silver Spring
Crixus Construction
El Pueblo Inn
Equal Justice of America
Gelman, Rosenberg, & Freedman
Geppetto Catering
Giant Food
Glover Park Hotel
H&W Independent Solutions
Health Services for Children
With Special Needs
Hotel Monaco
Howard County Autism Society
IAAAA
Donors – Thank You for your contributions and support. You help us make a difference!

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Ingleside Vineyards
Jimmy’s Famous Seafood
Kellogg Conference Center
Kennedy Institute
Knob Winery
Ledo’s Pizza
Lettuce Entertain You
Loews Annapolis Hotel
Mon Ami Gabi
Meltzer Group
Miller and Long, DC
Monument Bank
Nando’s Peri Peri
Not Your Average Joe’s
National Children’s Center
Odyssey Cruises
Office of Public Guardian, Inc.
Palladar Gaithersburg
Paul’s Wine & Spirits
Penn Commons
PF Chang’s
Polander Academy of Martial Arts
Pollinger Company
Pure Barre Bethesda
Raffa
Renaissance Washington DC Downtown Hotel
RCM of Washington
Ritz Carlton
Round House Theater
Shared Horizons, Inc.
SoulCycle
Stella Barra
Summer House
Syracuse University
The Pearl Modern Spa and Boutique
The Puppet Company
The ARC of Washington, DC
The ARC of Florida
The Management Group, Inc.
Therap Services
University of Kentucky
Upstairs on 7th
Van Ness Center Associates
Verizon
Volunteers of America, Minnesota
Washington Marriott Marquis
Wiley Rein
Wilmer Cutler Pickering & Hale
Wings Enterprises, Inc.

ZIPS Drycleaners

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