

## 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.

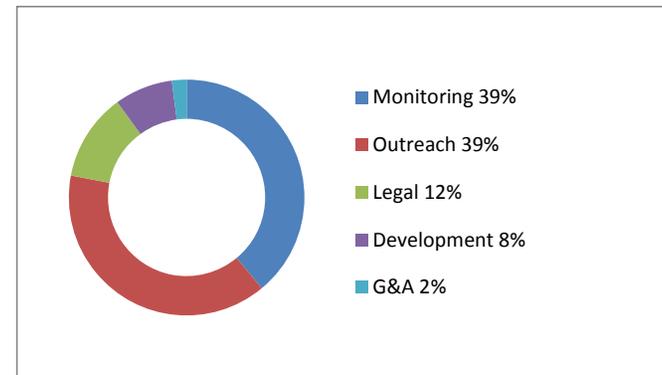
**QUALITY TRUST FINANCIAL SUMMARY  
OCTOBER 1, 2016 - SEPTEMBER 30, 2017**

**ASSETS**

<b>Current Assets:</b>	<u>September 30, 2016</u>	
Cash		\$1,766,315
Pledges Receivable		0
Accounts Receivable		73,781
Accrued Interest and Dividends		3,108
Prepaid Expenses		40,881
Other current assets		0
	Total current assets	<u>\$1,884,085</u>
<b>Property and Equipment:</b>		
Equipment		19,232
Furniture		19,199
Computer equipment		77,036
Leasehold improvements		207,143
		<u>\$322,610</u>
Less accumulated depreciation		-138,772
	Net fixed assets	<u>\$183,838</u>
<b>Other Assets:</b>		
Investments		17,530,467
Pledge receivable - long term		0
Deposits		16,756
	Total other assets	<u>\$17,547,223</u>
<b>Total Assets:</b>		<b>\$19,615,146</b>
 <b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities:</b>		
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	<u>\$244,997</u>
<b>Long-Term Liabilities:</b>		
Deferred rent		65,655
Deferred tenant allowance		127,848
	Total long-term liabilities	<u>\$193,503</u>
<b>Total Liabilities:</b>		<b>\$438,500</b>
<b>Net Assets:</b>		
Unrestricted		8,091,702
Temporarily Restricted		11,084,944
	Total net assets	<u>\$19,176,646</u>
<b>Total Liabilities and Net Assets:</b>		<b>\$19,615,146</b>

**STATEMENT OF ACTIVITIES**

Twelve months ended September 31, 2016	
<b>Revenues:</b>	
Contributions & Grants	\$577,925
Interest and Dividends	2,346,224
Rent Reimbursement	38,439
Other revenue	260,925
<b>Total Revenue:</b>	<u>\$3,223,513</u>
<b>Expenses:</b>	
Personnel compensation & benefits	\$1,781,248
Occupancy	172,585
Consulting fees	473,043
Operating expenses	230,833
<b>Total Expenses:</b>	<u>\$2,657,709</u>
Change in net assets:	\$565,804
Net Assets at Beginning of Period	\$18,610,842
<b>Net Assets at September 30, 2016</b>	<u>\$19,176,646</u>



**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  
Yolandra Plummer  
Steven Powe  
Andrew Reese  
Catherine Robertson  
Victor Robinson  
Jenise 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/LIA'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

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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 Marriot Marquis  
Wiley Rein  
Wilmer Cutler Pickering & Hale  
Wings Enterprises, Inc.

ZIPS Drycleaners

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