

Quality Trust Annual Report

October 1, 2017 – September 30, 2018

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 35 educational parent sessions reaching over 430 families
- Provided outreach and advocacy supports to 55 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 200 people
- Supported over 39 youth with advocacy supports and intervention (under 21)
- Participated in over 25 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 thin year include:

- Provided advocacy for 57 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 184 people
- Received and reviewed 1306 Incidents
- Made 141 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 475 matters affecting DC residents with disabilities.
- Conducted over 14 trainings in DC on issues involving guardianship and alternatives to over 250 attendees, under our DCBF-funded JHJP project
- Participated in the DDS Mortality Review Committee and reviewed over 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). 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.

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 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.

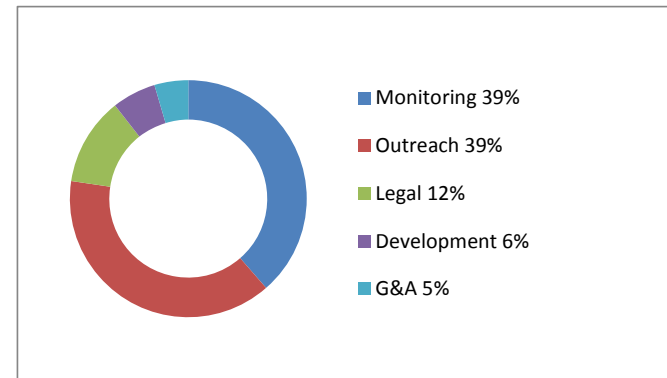
**QUALITY TRUST FINANCIAL SUMMARY
OCTOBER 1, 2017 - SEPTEMBER 30, 2018**

ASSETS

Current Assets:	<u>September 30, 2018</u>	
Cash		\$922,801
Pledges Receivable		0
Accounts Receivable		349,798
Accrued Interest and Dividends		3,031
Prepaid Expenses		28,360
Other current assets		0
	Total current assets	<u>\$1,303,990</u>
Property and Equipment:		
Equipment		19,232
Furniture		19,199
Computer equipment		77,036
Leasehold improvements		207,143
		<u>\$322,610</u>
Less accumulated depreciation		-165,510
	Net fixed assets	<u>\$157,100</u>
Other Assets:		
Investments		18,144,677
Pledge receivable - long term		0
Deposits		16,756
	Total other assets	<u>\$18,161,433</u>
Total Assets:		\$19,622,523
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Accounts payable and accrued liabilities		\$94,612
Accrued salaries and related benefits		139,755
Security deposit payable		0
Deferred revenue		0
Deferred tenant allowance		19,420
	Total current liabilities	<u>\$253,787</u>
Long-Term Liabilities:		
Deferred rent		73,703
Deferred tenant allowance		108,428
	Total long-term liabilities	<u>\$182,131</u>
Total Liabilities:		\$435,918
Net Assets:		
Unrestricted		19,087,068
Temporarily Restricted		99,537
	Total net assets	<u>\$19,186,605</u>
Total Liabilities and Net Assets:		\$19,622,523

STATEMENT OF ACTIVITIES

Twelve months ended September 31, 2018	
Revenues:	
Contributions & Grants	\$622,903
Interest and Dividends	1,814,737
Rent Reimbursement	38,587
Other revenue	369,887
	<u>\$2,846,114</u>
Total Revenue:	\$2,846,114
Expenses:	
Personnel compensation & benefits	\$1,920,389
Occupancy	165,642
Consulting fees	529,866
Operating expenses	234,851
	<u>\$2,850,748</u>
Total Expenses:	\$2,850,748
Change in net assets:	-\$4,634
Net Assets at Beginning of Period	\$19,091,702
	<u>\$19,087,068</u>
Net Assets at September 30, 2016	\$19,087,068



Donors – Thank you for your contributions and support. Your commitment to people with disabilities and Quality trust is greatly appreciated!

Quality Trust Fiscal Year

October 1, 2017 – September 30, 2018

Individuals

Jodi Albright	Ron Hampton	Precious Myers-Brown
Alison Arrington	Quintina Hampton	Chigor Ndukwe
Elver Ariza	Abby Harvey	Patricia Nobbie
Susan Burdette	Judith Heumann	Deon Noel
Jasmine Baker	Donna Holt	Hassan Ohiokpehai
Karlyn Barker	Phyllis Holton	Neal O'Reilly
Jay Batista	John Howard	Michael Orleans
Nicholas Batista	John Jackson	Ian Paregol
James Beadle	LeRoy Jackson	Claudia Payne
Keisha Blythe	Teresa Johnson	Germaine Payne
Cheryl Bolden	Nicole Jorwic	Chase Phillips
Pier Broadnax	Judith Karsevar	Yolandra Plummer
Todd Bromberg	Robert Kennedy, Jr.	Christina Portz
Jessica Bronson	Ben King	Steven Powe
Amy Brooks	Herbert & Susie King	Andrew Reese
Jessica Bronson	Robyn King	Victor Robinson
Patricia Browne	Ryan King	Jenise Ross
Tina Campanella	Arlene King-Berry	Vincent Russo
Maedi Tanham Carney	Chris Korin	Rebecca Salon
Chadwick Charles	Paul Laurenza	Curtis Schehr
Kimberly Chavis	James Lee	Steven Simms
Courtney Clark	Jimi Lethbridge	Carrie Singer
Richard Clark	Erin Leveton	Kristina Southerly
Bernard Crawford	Christine Loo	Kathryn Speakman
Sondra Cunningham	Christopher Lucey	Ernestine Tebong-Spreemann
Halimatu Dabor	Neal O'Reilly	Angelo Telesford
Doug Damron	Clark T. Madigan & Karen L. Davis	Marsha Thompson
Effie Davis	Jonathan Martinis	Ricardo & Donna Thornton
Donald Dell	John Matelis	William Thornton
Robert Dinerstein	Lisa Matthews	Darius Villa
Arielle Dorros	Yolanda Mazyck	Mercedes Vinciguerra
Vijay D'Souza	Anna McDermott-Vitak	Molly Whalen
Rosalind German	Rhoda McLeese Smith	Morgan Whitlatch
Lisa Greenman	Tamme Miles	Alison Whyte
Carol Grigsby & Paul Fekete	Kathy Mitchell	Mark Wiesel
Merrill Friedman	Salena Mohammed-Graves	Lindsey Wilkes
Frances Grigsby	La Rita Monagan	Tresa Welch
Lenneita Haigler	Ryan Mossbarger	Erica Wood
Carl & Frances Hampe		

Rose Woodland
Mark Wurzbacher
Tiffany Yuille

Foundations

Bank of America Foundation
DC Bar Foundation
Leder/Greenman
Foundation

Government

Department on Health &
Human Services, ACL
DC Developmental
Disabilities Council
Mayor's Office on Latino
Affairs
National Council on
Disabilities

Companies

All Purpose
Anacostia Playhouse
Theatre
ANCOR
Anthem
Arena Stage
Baked and Wired
Barrel Oak Winery
Blue44
Bluebell Hair Salon and Spa
Bluestone
Bradford Portraits
Breux Vineyards
CareFirst BlueCross
BlueShield
Catch a Dream Studio
Chicken + Whiskey
Chuy's Fine TexMex
COMCAST
El Pueblo Inn
Entertainment Cruises

Fogo de Chao
Folger Shakespeare Library
Fulcrum Properties Group
Gelman, Rosenberg &

Freedman
Geppetto Catering
Giant Food
Glover Park Hotel
H&W Independent
Solutions
Homewood Suites
Inga Robbins
Ingleside Vineyards
InterContinental Hotel
Joseph Reo Massage
Kellogg Conference Hotel
Landmark Theatres
Lee's Flowers and Cards
Marcum, LLP
Marriott Marquis Hotel
Mexican Table, LLC
Miller & Long, DC
NFP/The Meltzer Group
Nando's Peri Peri
Neiman Marcus
Old Hickory Golf Club
Olney Theatre
PF Chang's
Paul's Wines & Spirits
Pearl Spa
Polinger Company
Raffa, Marcum's Nonprofit
& Social Sector Group
RCM of Washington
Renaissance Downtown, DC
Revere Bank
Rich Kessler
Rocklands Real BBQ
RoundHouse Theatre
Shared Horizons, Inc.
SoulCycle
Southwest Airlines
Syracuse University
The Ritz-Carlton

Wiley Rein
WilmerHale
Woolly Mammoth Theatre
Zumbini

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