

## **Quality Trust Annual Report**

### **October 1, 2019 – September 30, 2020**

Quality Trust is staffed with a team of passionate, disability advocates with over 200-years' experience combined. This is not just our job – it is who we are! It's been seven months since we began dealing with the COVID-19 virus. Last March 13, two days after our annual Better Together Reception, we received the order from the District of Columbia to move to remote work due to the pandemic. We continued our work in support of people with developmental disabilities and their families throughout the region without any significant disruption. Our virtual outreach became fully operational and our staff worked harder than ever to stay connected with the people who depend on Quality Trust for support. Providing that support required us to be extra vigilant and alert to the new patterns of life people experienced during the health emergency. Although challenging, our role has never been more important!

At Quality Trust we are often asked to be advocates with people to address the many barriers that they still sometimes face in accessing the communities in which they live. In this virtual world, that means making sure that people with disabilities (and their families) have access to the technology they need to stay connected with each other and join in the meetings that are happening online. It's just one of the many ways we contributed to making our community more welcoming for the people we support.

**Outreach:** Quality Trust's community outreach team of 5 professionals ensure people within our community can learn about and access the resources, information, and expertise at Quality Trust. We partner with local advocacy organizations, government agencies and other community stakeholders to provide educational and resource materials with people. Some of our activities this past year include:

- Provided over 40 educational parent sessions reaching over 430 families
- Provided outreach and advocacy supports to 60 LAC families
- Participated in over 35 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. A significant number of monitoring reviews were completed by the middle of March 2020 when the novel coronavirus completely changed the trajectory of everything. In April and May of 2020, the COVID-19 virus raged, causing extensive damage in congregate living models of more than three people. Day programs were forced to close, and people stayed at home as all

other citizens in the city. Quality Trust modified its monitoring protocol to focus on understanding how effectively the needs of people with disabilities were being met in different settings, and to continue the regular monitoring process through remote methods. Some highlights of our work this year include:

- Provided advocacy for 90 people with outcomes that included residential moves, improved healthcare, change of day programs and help with benefits
- Received and reviewed 1120 Incidents
- Made 67 follow up visits to people related to concerns or changes in care circumstances

**Legal Services:** Quality Trust's Legal team of three provide high-quality legal advice for people with disabilities and their families and mastered during so virtually this year. QT attorneys participate in QT's outreach and education activities and are available for individual consultation on specific legal concerns. They have developed specific expertise in guardianship and decision-making that they use for helping individuals and families as well as shaping policy and practice in DC. Some of the highlights include:

- Provided legal services in over 480 matters affecting DC residents with disabilities
- Conducted over 17 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 42 investigations

**#ProjectPeerToo:** Quality Trust has continued our work virtually on the #ProjectPeerToo project with our partners, DC Rape Crisis Center, Project ACTION!, and the DC Department of Disability Services (DDS), that includes the Developmental Disabilities Administration (DDA) and the Office of Quality Assurance and Performance Management (QAPMA). We met regularly via Zoom and supported our self-advocates to get iPads, training and ongoing support to participate in our regular meetings, as their non-participation is not an option.

**Family Ties of DC:** Quality Trust continued our work in the second year of the Family Ties of DC program. We made 11 successful parent matches, held monthly parent chats, convened "Hot Topics" webinar series for parents and were available to support parents who were experiencing challenges related to COVID-19. We made referrals for parents and recruited additional support parents to participate in the program.

**Financials:** Quality Trust was established in 2001 during class action litigation that provided an initial endowment payment, 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. Our investment fund remains strong and our fundraising efforts continue to increase annually.

**QUALITY TRUST FINANCIAL SUMMARY**  
**OCTOBER 1, 2019 - SEPTEMBER 30, 2020**

**ASSETS**

<b>Current Assets:</b>	<u>September 30, 2020</u>	
Cash		\$1,299,465
Pledges Receivable		0
Accounts Receivable		161,415
Accrued Interest and Dividends		2,663
Prepaid Expenses		13,153
Other current assets		<u>0</u>
Total current assets		\$1,476,696
 <b>Property and Equipment:</b>		
Equipment		19,232
Furniture		19,199
Computer equipment		87,886
Leasehold improvements		<u>207,143</u>
		\$333,460
Less accumulated depreciation		<u>-217,128</u>
Net fixed assets		\$116,332
 <b>Other Assets:</b>		
Investments		15,956,947
Pledge receivable - long term		0
Deposits		<u>16,756</u>
Total other assets		\$15,973,703
 <b>Total Assets:</b>		 <b>\$17,566,731</b>

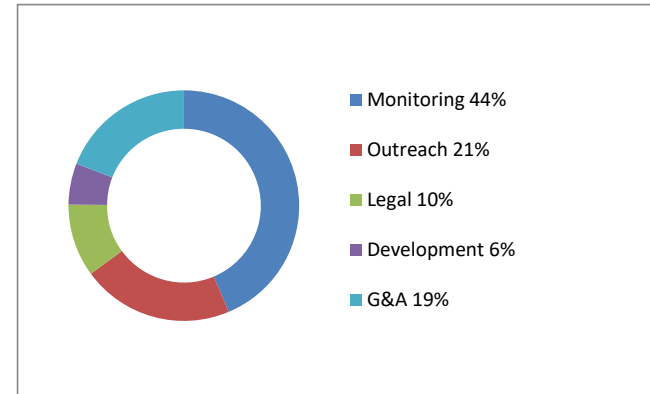
**LIABILITIES AND NET ASSETS**

<b>Current Liabilities:</b>		
Accounts payable and accrued liabilities		\$126,043
Accrued salaries and related benefits		151,984
Deferred revenue		6,898
Refundable advances		25,526
Deferred revenue		19,420
Loan payable		<u>263,682</u>
Total current liabilities		\$593,553
 <b>Long-Term Liabilities:</b>		
Deferred rent		68,226
Deferred tenant allowance		69,588
Loan payable		<u>176,072</u>
Total long-term liabilities		\$313,886
 <b>Total Liabilities:</b>		 <b>\$907,439</b>
 <b>Net Assets:</b>		
Unrestricted		16,594,780
Temporarily Restricted		<u>64,512</u>
Total net assets		\$16,659,292
 <b>Total Liabilities and Net Assets:</b>		 <b>\$17,566,731</b>

**STATEMENT OF ACTIVITIES**

Twelve months ended September 31, 2020

<b>Revenues:</b>		
Contributions & Grants		\$375,101
Interest and Dividends		1,253,205
Rent Reimbursement		0
Other revenue		<u>103,746</u>
<b>Total Revenue:</b>		<b>\$1,732,052</b>
 <b>Expenses:</b>		
Personnel compensation & benefits		\$1,901,234
Occupancy		170,953
Consulting fees		165,803
Operating expenses		<u>240,576</u>
<b>Total Expenses:</b>		<b>\$2,478,566</b>
Change in net assets:		-\$735,928
Net Assets at Beginning of Period		<u>\$17,395,220</u>
<b>Net Assets at September 30, 2016</b>		<b>\$16,659,292</b>



**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, 2019 – September 30, 2020**

**Individuals**

Monique Acosta-House  
Jodi Albright  
Alison Arrington  
Elver Ariza-Silva  
Susan Burdette  
Karlyn Barker  
Michael Bidinger  
Thomas Bovich  
Pier Broadnax  
Todd Bromberg  
Jessica Bronson  
Amy Brooks  
Susan Brooks  
Jessica Bronson  
Marilyn Brown  
Walter Brown  
Lily Bruch  
Beth Brummett  
Susan Burdette  
Ted Burkett  
Tina Campanella  
Maedi Tanham Carney  
Chadwick Charles  
Kimberly Chavis  
Jeremy Chriss  
Rachel Chung  
Courtney Clark  
Fern Clark  
Mindy Cohen  
Ginny Colten-Bradley  
Ginny Conroy  
Keith Copeland  
Bernard Crawford  
Sondra Cunningham  
Halimatu Dabor  
Doug Damron  
Lillian Dansby  
Danielle Darby  
Effie Davis

Donald Dell  
Robert Dinerstein & Joan  
Fread  
Arielle Dorros  
Amy Downey  
Vijay D'Souza  
Stanley & Jacqueline  
Fleischman  
Joyce Forrest  
Melissa Fossberg  
Amy Fredenburg  
Merrill Friedman  
Stephanie Gelman  
Rosalind German  
Lisa Greenman  
Lauren C. Greep  
Carol Grigsby & Paul Fekete  
Brittney Goodwin  
Frances Grigsby  
Sara Grigsby  
Ron & Quintina Hampton  
Kate & Sam Heuck  
Donna Holt  
Elaine Holt  
Gail Holmes  
Phyllis Holton  
John Howard  
Soledad Jacinto  
Andrea Jackson  
John Jackson  
Deranand Jillapalli  
Romona Joaquin-Gill  
Teresa Johnson  
Nicole Jorwic  
Judith Karsevar  
Robert Kennedy, Jr.  
Patricia Kent  
Ben King  
Herbert & Susie King  
Robyn King

Ryan King  
Arlene King-Berry  
Chris Korin  
Paul Laurenza  
James Lee  
Jimi Lethbridge  
Erin Leveton  
Bethany Lilly  
Christine Loo  
Christopher Lucey  
Mary O'Meara  
Clark T. Madigan and Karen  
L. Davis  
Thomas Mangrum, Jr.  
Marc Martinez  
Jonathan Martinis  
John Matelis  
Lisa Matthews  
Yolanda Mazyck  
Anna McDermott-Vitak  
Rhoda McLeese Smith  
Tammie Miles  
Kathy Mitchell  
Nathalie Mizelle-Johnson  
Solveig Mortensen  
Precious Myers-Brown  
Chigor Ndukwe  
Patricia Nobbie  
Neal O'Reilly  
Michael Orleans  
Jahera Otieno  
Ian Paregol  
Marsha Patrick  
Claudia Payne  
Germaine Payne  
Patrizia Peyton  
Chase Phillips  
Yolandra Plummer  
Steven Powe  
Andrew Reese  
Christy Rice

**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, 2019 – September 30, 2020**

Victor Robinson  
Mariana Roig  
Jenise Ross  
Mark Roush  
Troy Russell  
Vincent Russo  
Rebecca Salon  
Curtis Schehr  
Robin Shaffert  
Steven Simms  
Carrie Singer  
Glenda Smith  
Kristina Southerly  
Kathryn Speakman  
Deborah Spitalnik  
Walter Suskind  
Ernestine Tebong-Spreeman  
Angelo Telesford  
Shirley Thomas  
Marsha Thompson  
Ricardo & Donna Thornton  
William Thornton  
Susie Van Pool  
Sandra Van Fossen  
Darius Villa  
Teresa Villani  
Mercedes Vinciguerra  
Molly Whalen  
Carol & Tom Wheeler  
Morgan Whitlatch  
Tresa Welch  
Mark Wiesel  
Erica Wood  
Rose Woodland  
Mark Wurzbacher  
Tiffany Yuille

**Foundations**

Bank of America Foundation

DC Bar Foundation  
Leder/Greenman  
Foundation  
WITH Foundation

**Government**

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

**Companies**

ANCOR  
Anthem  
CareFirst BlueCross  
BlueShield  
COMCAST  
Entertainment Cruises  
Gelman, Rosenberg &  
Freedman  
Giant Food, Inc.  
H&W Independent  
Solutions  
Lee's Flowers and Cards  
Marcum, LLP  
Miller & Long, DC  
NFP/The Meltzer Group  
Polinger Company  
QCore Group, LLC  
Raffa, Marcum's Nonprofit  
& Social Sector Group  
RCM of Washington  
Revere Bank  
Shared Horizons, Inc.

Syracuse University  
WilmerHale

**Board of Directors**

Chase Phillips  
Nicole Jorwic  
Pier Broadnax  
Carol Grigsby  
Quintina Hampton  
Thomas Bennett King  
Nathalie Mizelle-Johnson  
Yolandra Plummer  
Steven Powe  
Curtis Schehr  
Walter Suskind  
Donna Thornton  
Keith Wright