

Quality Trust Annual Report

October 1, 2020 – September 30, 2021

Quality Trust's team of passionate and professional disability advocates continued their important advocacy work in the District of Columbia as COVID continued to impact the lives of people we support. There are many signs of hope and progress as the year moves forward. Boosters are available, more people with disabilities are mastering how to use virtual technology, and we are delighted when we have been able to meet in-person in safe venues, usually outdoors. While Quality Trust is still working remotely, we have begun discussions for how we will transition to more in-person work and engage with people, families, and our partners over time.

We are looking forward to the chance to reunite with our friends and coworkers and are hopeful that we will continue to see positive trends regarding the community spread of COVID-19. In the meantime, we are grateful for the opportunity for people to connect on some level with family and friends and encourage everyone to remain vigilant in your precautions as you do.

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 is just one of the many ways we contributed to making our community more welcoming for the people we support.

Monitoring and Advocacy: Quality Trust's monitoring and advocacy work is staffed by a team of 8 dedicated professional advocates with many years of direct experience supporting people with developmental disabilities to live meaningful lives. We continued to see the impact of COVID-19 in our work but resumed meeting people in the community and their homes more regularly if they were comfortable doing so. We continued to use virtual tools such as Zoom and WhatsApp as requested by many people we support. Quality Trust also focused on learning how effectively the needs of people with disabilities were being met in different settings and advocated that people be more active in the community if they wanted to do so. 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 1130 Incidents.
- Made 64 follow-up visits to people related to concerns or changes in care.
- Completed 309 nursing reviews.
- Completed 237 monitoring reviews.

Legal Services: Quality Trust's Legal team of three continued providing high-quality legal advice for people with disabilities and their families. Quality Trust attorneys

participate in Quality Trust's outreach and education activities and are available for individual consultation on specific legal concerns. They have specific expertise in guardianship and decision-making that they employ when 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 impacting DC residents with disabilities.
- Conducted over 45 training courses on issues involving guardianship and alternatives to over 225 attendees, under our DC Bar Foundation-funded Jenny Hatch Justice Project.
- Participated in the DC Department on Disability Services (DDS) Mortality Review Committee and reviewed over 42 investigations.

Outreach: Quality Trust's community outreach team of 6 professionals ensures people in our community know about and can access the resources, information, and expertise at Quality Trust. We partner with local advocacy organizations, government agencies, and other community stakeholders to provide educational resources to people with developmental disabilities and their families. Some of our activities this past year include:

- Provided over 23 trainings sessions reaching over 400 people.
- Provided outreach and advocacy supports to 77 Latino families.
- Supported over 80 people with disabilities.
- Participated in over 35 community events.

#ProjectPeerToo: Quality Trust continued our work on #ProjectPeerToo with our partners, DC Rape Crisis Center, Project ACTION!, and DDS. We began planning focus groups, as well as surveys, for important stakeholders to learn about the system in DC for providing support to people with developmental disabilities who are survivors of sexual violence.

Family Ties of DC: Quality Trust continued our work in the third year of the Family Ties of DC program. We have hosted over 10 meetings for support parents, made successful parent matches, held monthly parent chats, convened trainings for parents, and supported parents with COVID-19 related challenges.

Financials: Quality Trust was established in 2001 during class action litigation that provided an initial endowment payment, and most of our annual funding is provided by the interest from this investment fund. Since 2014, we have focused on decreasing the reliance on our investments through grants, contract work, and engaging corporate and individual donors as funding partners. The COVID-19 pandemic challenged our fundraising as we transitioned to virtual events and did not host our major Gala. We work closely with Quality Trust's Board of Directors to identify new strategies to collaborate with businesses, acquire new supporters, and explore other revenue opportunities. Our investment fund remains strong.

QUALITY TRUST FINANCIAL SUMMARY
OCTOBER 1, 2020 - SEPTEMBER 30, 2021

ASSETS

Current Assets:	<u>September 30, 2021</u>	
Cash		\$1,266,011
Grants and Contributions Receivable		53,046
Prepaid Expenses and Other Current Assets		6,460
	Total current assets	<u>\$1,325,517</u>
Fixed Assets:		
Equipment		\$19,232
Furniture		19,199
Computer equipment		98,180
Leasehold improvements		207,143
		<u>\$343,754</u>
Less accumulated depreciation		-244,665
	Net fixed assets	<u>\$99,089</u>
Other Assets:		
Investments		\$18,014,539
Deposits		16,756
	Total other assets	<u>\$18,031,295</u>
Total Assets:		\$19,455,901

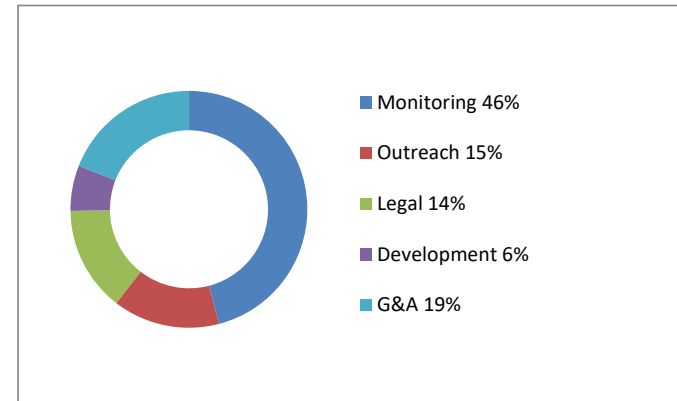
LIABILITIES AND NET ASSETS

Current Liabilities:		
Loan payable		\$439,754
Accounts payable and accrued expenses		100,027
Accrued salaries and related benefits		160,548
Deferred rent		12,156
Refundable advances		22,490
Deferred tenant allowance		19,420
	Total current liabilities	<u>\$754,395</u>
Long-Term Liabilities:		
Deferred rent, net of current portion		\$56,070
Deferred tenant allowance, net or current portion		50,168
	Total long-term liabilities	<u>\$106,238</u>
Total Liabilities:		\$860,633
Net Assets:		
Without donor restrictions		\$18,594,397
With donor restrictions		871
	Total net assets	<u>\$18,595,268</u>
Total Liabilities and Net Assets:		\$19,455,901

STATEMENT OF ACTIVITIES

Twelve months ended September 31, 2021

Revenue and Support:		
Contributions & Grants		\$232,458
Interest and Dividends		3,726,271
Rent Reimbursement		0
Other revenue		90,753
	Total Revenue:	<u>\$4,049,482</u>
Expenses:		
Personnel compensation & benefits		\$1,923,595
Occupancy		169,810
Consulting fees		224,798
Operating expenses		235,057
	Total Expenses:	<u>\$2,553,260</u>
Change in net assets before other items		\$ (2,230,049)
Other Items		
Investment (loss) income, net		\$3,726,271
Forgiveness of debt		439,754
Change in net assets:		<u>\$1,935,976</u>
Net Assets at Beginning of Period		\$16,659,292
Net Assets at September 30, 2021		<u>\$18,595,268</u>



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, 2020 – September 30, 2021

Individuals

Monique Acosta House
Elver Ariza-Silva
Vineet Arya
Kelli Atkinson
Evette Banfield
Karlyn Barker
Sandy Bernstein
Elizabeth Bizot
Anne Book
Susan Burdette
Tina Campanella
Vince Campanella
Linda Carlson
Chadwick Charles
Kimberly Chavis
Betty Clark
Courtney Clark
Fern Clark
Sondra Cunningham
Halimatu Dabor
Kathryn Davis
Robert Dinerstein
Arielle Dorros
Vijay D'Souza
Alexandra Finucane
Toya Fisher
Amy Fredenburg
Lauri Gellman Wallace
Lori Golden
Carol Grigsby
Frances Grigsby
Sara Grigsby
Quintina Hampton

Kate Heuck
Phyllis Holton
John Howard
Soledad Jacinto
Teresa Johnson
Nicole Jorwic
Clark T Madigan &
Karen L Davis
Patricia Kent
Ben King
Ryan King
Susie King
Arlene King-Berry
Chris Korin
James Lee
Jimi Lethbridge
Erin Leveton
Christine Loo
John Matelis
Lisa Matthews
Stuart L. & Susan May
Bonnie McCabe
Rhoda McLeese Smith
David Miller
Kathy Mitchell
Hazel Mosby
Chigor Ndukwe
Amanda Oetken
Michael Orleans
Jahera Otieno
Pierre Oury
Ian Paregol
Paula Parsons

Yolandra Plummer
Andrew Reese
Elizabeth Rihani
Maggie Roffee
Mariana Roig
Jenise Ross
Vincent Russo
Rebecca Salon
Gabriel Savage
Curtis Schehr
Robin Shaffert
Carrie Singer
Shearon Smith
Kristina Southerly
Kathryn Speakman
Walter Suskind
Amy Tabor
Mark Tannenbaum
Ernestine Tebong-Spreemann
Montrel Tennessee
Ricardo and Donna Thornton
Jody Tick
Susie Van Pool
Teresa Villani
Mercedes Vinciguerra
Mike Wehmeyer
Molly Whalen
Morgan Whitlatch
Alison Whyte
Mark Wiesel
Mark Wurzbacher

Foundations

Anonymous
DC Bar Foundation
WITH Foundation

Shared Horizons, Inc.
The Meltzer Group
Van Ness Center Associates, LLC
Wunder Garten

Government

Department of Justice
Department on Health & Human
Services, ACL
Mayor's Office on Latino Affairs
Office of Violence Against Women,
Dept. of Justice

Board of Directors

Nicole Jorwic
Jahera Otieno
Kate Boe
Carol Grigsby
Quintina Hampton
Ryan King
Thomas Bennett King
Lisa Matthews
Yolandra Plummer
Mariana Roig
Walter Suskind
Donna Thornton
Keith Wright

Companies

1750 Wine
AmeriHealth Caritas District of
Columbia
Cerner Government Services
Corporation
DC Bar Foundation
Disability Rights DC
Disability Rights Rhode Island
Giant Food, Inc.
GRF CPAs & Advisors (Gelman, Rosenberg & Freedman)
Office of Violence Against Women, Dept. of Justice
QCore Group
RAFFA – Marcum's Nonprofit & Social
Sector Group
RCM of Washington
ROIG Communications
Sandy Spring Bank