

Quality Trust Annual Report

October 1, 2021 – September 30, 2022

Quality Trust's team of fearless advocates and disability professionals remain steadfast in delivering our unique person-centered brand of advocacy for children, youth, and adults with intellectual and developmental disabilities in the District of Columbia. While we transitioned to expertly working remotely, staff have returned to our office and met with people in person wherever and whenever they wish. We hosted in-person trainings and engaged with our partners and supporters in person whenever we could.

At Quality Trust, our staff continued to listen intently and note what people with disabilities and their families share they need most to be self-sufficient, to be heard, and to be visible at places most important to them, getting what they need for their families. Staff came together across all programs to share what they were learning and to offer their recommendations to address the challenges faced by people we support and advocate for.

Monitoring and Advocacy: Quality Trust's monitoring and advocacy work is staffed by a team of 8 dedicated professional advocates with multiple years of direct experience supporting people with developmental disabilities to live meaningful lives. We continue to meet people where they are most comfortable, be it in person or virtually. We learned that many people are very lonely and excited to return to activities in the community. We encourage people to practice safe protocol but to be more active and with friends if that is what they want.

Some highlights of our work this year include:

- Provided advocacy for 30 people with outcomes that included residential moves, improved healthcare, change of day programs, and assistance with benefits.
- Received and reviewed 1116 Incidents.
- Made 91 follow-up visits to people related to concerns or changes in care.
- Completed 126 monitoring reviews.

Legal Services: Quality Trust's Legal team of three attorneys continued to provide high-quality legal advice for people with disabilities and their families. Quality Trust attorneys work collaboratively with other team members on advocacy interventions that require a legal review and representation. They also collaborate on 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 use when helping individuals and families, as well as shaping policy and practice in DC.

Some of the highlights include:

- Provided legal services in over 190 matters impacting DC residents with disabilities.
- Conducted over ten training courses on issues involving guardianship and alternatives.

- Participated in over 60 stakeholder meetings with the DC Department on Disability Services (DDS) Mortality Review Committee and other government and non-government committees and groups.

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 14 trainings sessions reaching over 250 people.
- Supported over 80 people with disabilities.
- Participated in over 30 community events and 13 formal collaborations with government and non-government organizations.

#ProjectPeerToo: Quality Trust continued our work on #ProjectPeerToo with our partners, DC Rape Crisis Center, Project ACTION!, and DDS. We submitted our Implementation Plan to the Office of Violence Against Women (OVW), which was approved. We have set up the respective work groups and assigned collaboration team members to each group. We look forward to continuing our progress in the grant in year one of our three-year grant.

Family Ties of DC: Quality Trust continued our work in the fourth year of the Family Ties of DC program. We hosted over eight meetings to support parents, made successful parent matches, and facilitated informational meetings to support parents with a multitude of events impacting their children's education, health, and well-being.

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 focused on decreasing the reliance on our investments through grants, contract work, and engaging individual donors and business and corporate entities as funding partners. We work closely with Quality Trust's Board of Directors to explore new strategies to collaborate with businesses, identify new supporters, and explore other revenue opportunities. Our investment fund remains strong.

QUALITY TRUST FINANCIAL SUMMARY
OCTOBER 1, 2021 - SEPTEMBER 30, 2022

ASSETS

Current Assets:	<u>September 30, 2022</u>	
Cash		\$636,146
Grants and Contributions Receivable		65,774
Prepaid Expenses and Other Current Assets		<u>9,005</u>
Total current assets		\$710,925
Fixed Assets:		
Equipment		\$19,232
Furniture		19,199
Computer equipment		110,826
Leasehold improvements		<u>207,143</u>
		\$356,400
Less accumulated depreciation		<u>-275,281</u>
Net fixed assets		\$81,119
Other Assets:		
Investments		\$13,662,583
Deposits		<u>16,756</u>
Total other assets		\$13,679,339
Total Assets:		\$14,471,383

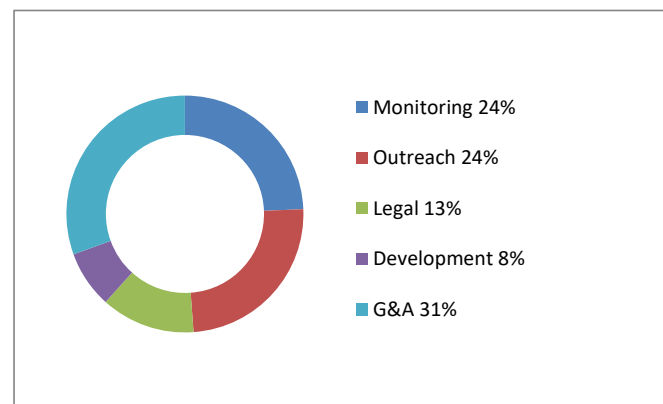
LIABILITIES AND NET ASSETS

Current Liabilities:		
Loan payable		\$141,260
Accounts payable and accrued expenses		122,547
Accrued salaries and related benefits		17,559
Deferred rent		31,483
Refundable advances		19,420
Deferred tenant allowance		
Total current liabilities		<u>\$332,269</u>
Long-Term Liabilities:		
Deferred rent, net of current portion		\$38,511
Deferred tenant allowance, net or current portion		<u>30,748</u>
Total long-term liabilities		\$69,259
Total Liabilities:		\$401,528
Net Assets:		
Without donor restrictions		\$14,069,855
With donor restrictions		<u>0</u>
Total net assets		\$14,069,855
Total Liabilities and Net Assets:		\$14,471,383

STATEMENT OF ACTIVITIES

Twelve months ended September 31, 2022

Revenue and Support:	
Contributions & Grants	\$332,605
Interest and Dividends	0
Rent Reimbursement	0
Other revenue	<u>87,694</u>
Total Revenue:	<u>\$420,299</u>
Expenses:	
Personnel compensation & benefits	\$1,947,390
Occupancy	171,336
Consulting fees	260,451
Operating expenses	<u>261,009</u>
Total Expenses:	<u>\$2,640,186</u>
Change in net assets before other items	\$ (2,219,887)
Other Items	
Investment (loss) income, net	\$ (2,745,280)
Forgiveness of debt	439,754
Change in net assets:	-\$4,525,413
Net Assets at Beginning of Period	<u>\$18,595,268</u>
Net Assets at September 30, 2022	\$14,069,855



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, 2021 – September 30, 2022

Individuals

Sid Ahvazi	Phyllis Holton	Andrew Reese
Vineet Arya	Monique House	Elizabeth Rihani
Kelli Atkinson	John Howard	Mariana Roig
Karlyn Barker	Soledad Jacinto	Jenise Ross
Sandy Bernstein	Nicole Jorwic	Vincent Russo
Elizabeth Bizot	Patricia Kent	Rebecca Salon
Anne Book	Ben King	Paige Santos
Amy Brooks	Ryan King	Gabriel Savage
Jane Brown	Susie King	Curtis Schehr
Susan Burdette	Thomas Bennett King	Robin Shaffert
Holly Caesar	Arlene King-Berry	Carrie Singer
Tina Campanella	Chris Korin	Shearon Smith
Vince Campanella	Lauren Lorenzen	Kristina Southerly
Linda Carlson	James Lee	Kathryn Speakman
Kimberly Chavis	Erin Leveton	Walter Suskind
Betty Clark	Jimi Lethbridge	Amy Tabor
Courtney Clark	Christine Loo	Mark Tannenbaum
Fern Clark	Clark T. Madigan & Karen L. Davis	Ernestine Tebong-Spreemann
Sondra Cunningham	John Matelis	Ricardo & Donna Thornton
Halimatu Dabor	Lisa Matthews	Jody Tick
Kathryn Davis	Stuart L. & Susan May	Shawn Ullman
Carey DeMatteis	Rhoda McLeese Smith	Scarlet Valdez
Robert Dinerstein	David Miller	Susie Van Pool
Arielle Dorros	Kathy Mitchell	Keri Vandenberg
Vijay D'Souza	Cheryl Mondri	Teresa Villani
Alexandra Finucane	Hazel Mosby	Mercedes Vinciguerra
Toya Fisher	Chigor Ndukwe	Laura Gellman Wallace
Amy Fredenburg	Michael Orleans	Mike Wehmeyer
Lauri Gellman Wallace	Jahera Otieno	Molly Whalen
Lori Golden	Pierre Oury	Morgan Whitlatch
Carol Grigsby	Ian Paregol	Alison Whyte
Frances Grigsby	Paula Parsons	Mark Wiesel
Sara Grigsby	Chigor Ndukwe	Keith Wright
Quintina Hampton	Amanda Oetken	Mark Wurzbacher
Kate Heuck	Yolandra Plummer	

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
Curtis Schehr
Jahera Otieno
Chadwick Charles
Kate Boe Hueck
Carey DeMatteis
Quintina Hampton
Ryan King
Thomas Bennett King
Lisa Mathews
Yolandra Plummer
Mariana Roig
Walter Suskind
Donna Thornton
Keith Wright

Companies

1750 Wine
AmeriHealth Caritas District of
Columbia
Chad O'L Public Relations & Events
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