

Quality Trust Annual Report

October 1, 2022 – September 30, 2023

Quality Trust's team of fearless advocates and disability professionals remain steadfast in providing their critical person-centered brand of advocacy for children, youth and adults with intellectual and developmental disabilities in the District of Columbia. After transitioning to a fully remote work model staff have returned to a hybrid work model; with some staff working remotely, advocates meeting people in their homes, at work and at the person's preferred location, and some staff work from the office regularly. We hold in-person meetings with clients, trainings for staff and others and engage with our partners and supporters in-person and remotely.

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. 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 29 people with outcomes that included residential moves, improved healthcare, change of day programs, and assistance with benefits.
- Received and reviewed 1167 Incidents.
- Made 84 follow-up visits to people related to concerns or changes in care.
- Completed 94 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 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 93 matters impacting DC residents with disabilities.
- Conducted over 14 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 19 trainings sessions reaching over 300 people.
- Supported over 62 people with disabilities.
- Participated in over 26 community events and in 10 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) and it was approved. We set up the respective work groups and are assigning collaboration team members to each group. We look forward to continuing our progress and 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 fourth 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 training for parents, and supported 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, 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. 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.

Donors - Thank you for your contributions and support. We greatly appreciate your commitment to people with disabilities and Quality Trust!

Quality Trust Fiscal Year

October 1, 2022 – September 30, 2023

Individuals

Monique Acosta	Donna Joy	Andrew Reese
Courtney Addison	Clark T Madigan & Karen L Davis	Mariana Roig
Sid Ahvazi	Susie King	Jenise Ross
Rachel Bass	Ryan King	Rebecca Salon
Amy Brooks	Arlene King-Berry	Curtis Schehr
Tina Campanella	Chris Korin	Robin Shaffert
Kimberly Chavis	James Lee	Carrie Singer
Samantha Crane	Jimi Lethbridge	Kristina Southerly
Karen Cunningham	Erin Leveton	Jaclyn Spainhour
Halimatu Dabor	Christine Loo	Kathryn Speakman
Brenda Davis	Lucius Mangrum	Walter Suskind
Carey DeMatteis	John Matelis	Gabe Taylor
Zach and Laura Dietz	Lisa Matthews	Ernestine Tebong-Spreemann
Robert Dinerstein	Stuart L. & Susan Striar	Donna Thornton
Arielle Dorros	May	Ricardo Thornton
Vijay DSouza	Matt Mellon	David Tubbs
David Goldfarb	Tammie Miles	Shawn Ullman
Carol Grigsby	Kathy Mitchell	Scarlet Valdez
Pamela Harmon	Chigor Ndukwe	Keri Vandeberg
Kate Heuck	Jahera Otieno	Molly Whalen
Elaine Holt	Pierre Oury	Morgan Whitlatch
Phyllis Holton	Yolandra Plummer	Keith Wright
John Howard	Christina Portz	Tiffany Yuille
Angela Isom	Tom Raffa	
Nicole Jorwic		

Foundations

Anonymous

Government

Department of Justice

Department on Health & Human
Services, Administration on
Community Living

Mayor's Office on Latino Affairs

Department of Justice, Office of
Violence Against Women

Companies

1750 Wines

Alamo Theater/DC Draft House

Amerigroup DC

AmeriHealth Caritas DC

Arena Stage Theatre

Aura Spa/Vida

Barry's Gym

Blue 44

Bradford Portraits

Brandeis University

Capital Grille

Capitol Stitch

CareSource

Celebration Tub

Chad O'L Public Relations & Events, LLC

Congressional Cemetery

Courtyard by Marriott

Crane's Restaurant

DC Autism Society

Disability Rights DC

Dragonfly Central, Inc.

East Road Beverages

Giant Food, Inc.

Grand CATA

Grand Hyatt Washington

Hotel Washington

Health Services for Children with
Special Needs

Institute for Exceptional Care

Intel Corporation

Kate Heuck

Key Bridge Boat House

Kitty Linton Photo Session

Krauthamer & Stahl, Chartered

Lee's Flower and Card Shop

Lettuce Entertain You Restaurants

Lia's Restaurant

Little Pearl

Liz DeMatteis

M&L Special Needs Planning, LLC

Maxwell Park

Moxy Washington DC

Mr. Bake Sweets

Mrs. Bakewell

National Association of Councils on
Developmental Disabilities

National Children's Center

Newmark

NFP

NIH Federal Credit Union

Odd Fund

Olney Theatre Center

Pure Barre DC

QCore Group

Quintina Hampton

RCM of Washington

Republic Restoratives liquors

ROIG Communications

Round House Theatre

Shared Horizons, Inc.

Sibling Leadership Network

Signature Theater

SPIRIT Club

Station 4 Restaurant

Teatime Baskets by Phyllis

The Bethesda Marriott

The Madison Hotel

Therap Services, LLC

Ricardo and Donna Thornton

Van Ness Center Associates, LLC

Wilmer Hale

Wunder Garten

Yoga District

Yolandra Plummer

Board of Directors

Nicole Jorwic

Curtis Schehr

Jahera Otieno

Chadwick Charles

Quintina Hampton

Kate Boe Heuck

Ryan King

Lisa Matthews

Yolandra Plummer

Mariana Roig

Walter Suskind

Donna Thornton

Keith Wright

QUALITY TRUST FINANCIAL SUMMARY
OCTOBER 1, 2022 - SEPTEMBER 30, 2023

ASSETS

Current Assets:	<u>September 30, 2023</u>	
Cash		\$1,003,346
Grants and Contributions Receivable		22,564
Prepaid Expenses and Other Current Assets		10,019
	Total current assets	<u>\$1,035,929</u>
Fixed Assets:		
Equipment		\$0
Furniture		13,649
Computer equipment		110,826
Leasehold improvements		207,143
		<u>\$331,618</u>
Less accumulated depreciation		<u>-279,658</u>
	Net fixed assets	\$51,960
Other Assets:		
Investments		\$13,617,555
Deposits		16,756
Right-of-use asset, net		249,606
	Total other assets	<u>\$13,883,917</u>
Total Assets:		\$14,971,806

LIABILITIES AND NET ASSETS

Current Liabilities:		
Operating lease liability		\$197,669
Accounts payable and accrued expenses		74,403
Accrued salaries and related benefits		143,344
Deferred rent		0
Refundable advances		0
Deferred tenant allowance		0
	Total current liabilities	<u>\$415,416</u>
Long-Term Liabilities:		
Deferred rent, net of current portion		\$0
Deferred tenant allowance, net of current portion		0
Operant lease liability, net of current portion		121,197
	Total long-term liabilities	<u>\$121,197</u>
Total Liabilities:		\$536,613
Net Assets:		
Without donor restrictions		\$0
With donor restrictions		0
	Total net assets	<u>\$0</u>
Total Liabilities and Net Assets:		\$14,971,806

STATEMENT OF ACTIVITIES

Twelve months ended September 31, 2023

Revenue and Support:		
Contributions & Grants		\$520,021
Interest and Dividends		0
Rent Reimbursement		0
Other revenue		153,231
	Total Revenue:	<u>\$673,252</u>
Expenses:		
Personnel compensation & benefits		\$1,910,595
Occupancy		174,672
Consulting fees		350,866
Operating expenses		229,225
	Total Expenses:	<u>\$2,665,358</u>
Change in net assets before other items		\$ (1,992,106)
Other Items		
Investment (loss) income, net		\$ 2,068,568
Employee retention tax credit		\$ 288,876
Forgiveness of debt		0
Change in net assets:		\$365,338
Net Assets at Beginning of Period		<u>\$14,069,855</u>
Net Assets at September 30, 2022		\$14,435,193

