



The Arc®

Oakland County

Serving persons with intellectual and developmental disabilities since 1967

ANNUAL REPORT

2  17

Dear Members and Friends of The Arc of Oakland County:

I am pleased to present the 2017 annual report for The Arc of Oakland County. This report contains information about our goals, history, and activities in the past year. We proudly celebrated our 50th anniversary in May. This was indeed an extraordinary achievement! When I meet people while volunteering for the annual Tootsie Roll drive, I am amazed at how many of them are already using our services. It is a testimony to our well-earned reputation and status as the “go-to” organization within the county for advocacy services for children and adults with intellectual and developmental disabilities.

Our anniversary would not have been possible without the efforts of our Executive Director, Tom Kendziorski, and the expertise and diligence of his hard-working staff. I also want to thank our Board of Directors for their experience and commitment to the cause. These dedicated individuals volunteer their time to help set policy and allow our organization to continually improve. At the start of each Board meeting we read The Arc’s mission statement, which states that we advocate for the rights and full participation of all children and adults with intellectual and developmental disabilities. This reminds us of the core values for which our organization stands.

It is incredible to think how much we’ve grown since we started in 1967. Our operating budget that year was \$10,800, while today it is about \$1.3 million. We were housed in a small office near the kitchen of the Ferndale Community Center. In 1987 when my family moved to Southfield, The Arc was located in a small office on Maple Road in Birmingham. Although our organization has grown tremendously since then, our commitment to those who need our services has not changed.

Some highlights in 2017 include the following:

- we set an all-time high paid membership total of 1,094;
- we authored and published a revised Annual Income Tax Guide for The Arc MI;
- Tom Kendziorski received the “Executive Excellence Award” from The Arc of the US and the National Conference of Executives;
- we presented another successful (47th!) Dove Awards and Silent Auction with Lt. Governor Brian Calley as the emcee; and,
- our Fiscal Intermediary staff set new standards of excellence while serving more consumers than ever before.

Our statistics for 2017 demonstrate the on-going demand for our wide-range of services:

- 1,650 children and adults served as Fiscal Intermediary;
- 590 new client intakes;
- 760 on-going clients requiring advocacy;
- 651 attendees at seminar presentations;
- 71 families assisted at IEP meetings;
- 24 individuals supported at their Person-Centered Plan meetings; and,
- 26 active participant members served by the Forever Plan.

To continue as the premier advocacy organization in Oakland County for consumers and their families in matters of education, financial assistance, estate planning, special needs trust administration, and residential services, we must always look for ways to improve the quality of the product that we deliver. Fortunately, our financial situation remains strong because of our success with fundraising, grants, and our role as fiscal intermediary for MORC. None of this would be possible without the outstanding support that we receive from our members, benefactors, and friends. Thank you so much. With your help, I have no doubt that we will continue to fulfill our mission into the future.

Respectfully,

David A. Loeffler
President
Board of Directors

Mission Statement

The Arc of Oakland County is committed to securing for all people with intellectual and developmental disabilities the opportunity to choose and realize their goals of where and how they learn, live, work and play.

The Arc of Oakland County works through education, research, and advocacy to improve the quality of life for children and adults with cognitive, intellectual, and developmental disabilities in every community; and, works to prevent both the causes and effects of intellectual and other related developmental disabilities.

Through the successful pursuit of equality and justice, The Arc of Oakland County will provide leadership in the field of intellectual and other related developmental disabilities and develop the necessary human and financial resources to attain its goals.

Purpose

The primary purpose is to provide "ADVOCACY." Specifically, The Arc of Oakland County: supports research focusing on prevention; develops better understanding of a cognitive/intellectual disability by the general public; cooperates and enlists the support of public and private agencies; furthers the recruitment, education and training of personnel to work in the field; furthers the adoption and implementation of appropriate statutes and; serves as a clearinghouse for gathering and disseminating information; fosters the development of quality programs; monitors programs and services; advises, assists, and guides persons with intellectual disabilities and their families to appropriate resolutions to their problems; cooperates and assists The Arc of the U.S. and The Arc Michigan in the promotion of common objectives; and, obtains the funds to accomplish these objectives.

Background Information

The Arc of Oakland County was incorporated in 1967 through the efforts of parents and families of persons with an intellectual and/or developmental disability for the purpose of improving current services and to develop new programs by way of supportive and appropriate legislation.

Through a combined effort with other advocacy groups, significant laws were passed at state and federal levels. These laws addressed the critical areas of education, housing, civil rights, the family support subsidy, and more.

**WHILE MUCH HAS BEEN ACCOMPLISHED,
MUCH MORE NEEDS TO BE DONE.**

Present

The membership of The Arc of Oakland County finished 2017 at 1,094. We also have an ancillary list of friends and supporters of approximately 75.

The Arc of Oakland County is directed by a fifteen member Board of Directors and its professional staff of fifteen: the Executive Director and Attorney at Law; Comptroller and Office Manager; Administrative Assistant and Member Services Coordinator; Director of Public Relations and Development; Staff Advocate for Special Education; The Forever Plan Monitor; and, nine Fiscal Intermediary Analysts.

The professional staff, together with the Board of Directors, assists both individuals with intellectual and developmental disabilities and their families within the community-at-large.

Their activities include but are not limited to; helping families obtain appropriate services; addressing individual needs regardless of age or severity of handicap; monitor community living arrangements, education, and work programs; advocate for those individuals with intellectual and other related developmental disabilities whose circumstances require direct assistance; serve as fiscal intermediary for Macomb-Oakland Regional Center individuals enrolled in Self-Determination and, advocate for the passage of state and federal legislation that will impact the lives of all persons with intellectual and other developmental disabilities.

The Year In Review

AWARENESS: PUBLIC INFORMATION AND EDUCATION WITH EDUCATION AND AWARENESS COMES UNDERSTANDING AND ACCEPTANCE.

The Arc of Oakland County views increased public awareness as one of the major components to greater understanding and community acceptance of persons with intellectual and other developmental disabilities. To this end, The Arc of Oakland County staff provides members, families, professionals, organizations, and the community-at-large with direct and indirect information about intellectual and other related developmental disabilities. The Arc provides speakers who promote public awareness of The Arc services and activities together with an awareness of what is an intellectual and other developmental disability.

The Arc of Oakland County staff also provides families with direct information about community resources as well as referrals to schools, physicians, dentists, attorneys, CPAs and others.

Printed information is available upon request. A sample mailing packet would include: our national award-winning monthly newsletter, PROFILES, a brochure explaining the programs and services of The Arc of Oakland County, a membership application, plus other information relating to a specific request. Also available free on-line is an award-winning publication authored by the Executive Director of The Arc of Oakland County: Annual Income Tax Guide.

Information regarding programs and services available through The Arc of Oakland County as well as many other professionally written articles and PowerPoint presentations may be accessed via our website at www.thearcoakland.org.

The Arc of Oakland County's Facebook page may be accessed through the website and is a place where members, consumers and friends can stay connected with updates on fundraising events, community affairs and legislative issues. The Arc of Oakland County's YouTube page may also be accessed through the website and houses The Arc of Oakland County's Agency Video and 30 Second Public Service Announcement. Additional videos may also be uploaded in the future.

Systems Advocacy

The Arc of Oakland County served over 2,400 persons in an advocacy capacity within the last year. These services encompassed the following areas of expertise:

(1) Financial Assistance (SSI, SSDI, Medicaid, Adult Home Help Services, Medicare, Tax, Food Stamps, Family Support Subsidy, and Section 8 Housing); (2) Special Education (I.E.P.'s, Hearings, M.E.T.'s); (3) Legal Matters (Wills, Living Trusts, Guardianships, Estate Planning); (4) the Annual income Tax Guide; and, ABLE Act accounts.

Legal and lay advocates are available to assist new clients/families with the aforementioned services together with general advocacy and issues unique to each family situation.

The Forever Plan

The Forever Plan (formerly known as The Etheridge Plan), a lifetime, comprehensive advocacy program, is dedicated to program development and expansion, and the monitoring of participants. This program addresses the parents' question, "What will happen to my child when I'm gone?" Work and planning is ongoing to further solidify the program in order that it may serve the future needs of our families.

The Forever Plan is an individualized contractual agreement that requires membership with The Arc of Oakland County. The Forever Plan is designed to meet the needs of each individual with special needs utilizing ALL available community resources based on the individual needs of the participant and his/her family.

The Forever Plan Informational Meetings are held periodically to assist families on matters regarding long-term planning for their family member with special needs through The Forever Plan. Additional meetings may be scheduled in the future.

- 62 total paid enrollees
- 25 active participants
- 7 trusts managed
- 3 served as Representative Payee
- 9 served as partial guardian

Dignified Lifestyles

In cooperation with The Arc Michigan and the Michigan Department of Health and Human Services (MDHHS), volunteers of The Arc's local Dignified Lifestyles / Community Connections (DLS/CC) program monitored ten Macomb-Oakland Regional Center, Inc. group homes, including one adult respite home. About five years ago, the DLS/CC program changed course and the volunteers and staff began to collect National Core Indicator survey data from individual consumers and families about public mental health services and community inclusion. In 2014, the program focus was again altered. This time it was all about person-centered planning and review of the person-centered planning process. This included participating in local site reviews, training on person-centered planning and reviewing the actual plans that have restrictions. This program ended as of October 1, 2017.

Incorporating person-centered-planning and achieving real outcomes for individuals in mental health funded settings are driving the impending changes in the program.

Building on the successes and strong points of the earlier versions, the Dignified Lifestyles/Community Connections Program will:

- put people first;
- support the dreams and choices of individuals;
- strive to raise the expectations that others (particularly the staff persons in the home environment) have of persons with
- disabilities;
- advocate for concrete changes in peoples' lives; and,
- propagate the philosophy of inclusion and person-centered decision-making.

Fiscal Intermediary

Contracted by Macomb-Oakland Regional Center, Inc., The Arc of Oakland County serves as Fiscal Intermediary for individuals who have chosen Self-Determination.

As Fiscal Intermediary, The Arc processes invoices, time sheets, and respite vouchers on behalf of each consumer, helps them monitor their individual budget, current PCP guidelines, and Medicaid law. The Arc staff works with the consumer, his/her family, and their MORC, Inc. supports coordinator to help them flex their budgeted dollars to further meet their needs while staying within the guidelines of the current PCP and Medicaid.

The Arc of Oakland County acts as "Payroll Agent" for individuals who directly employ their own staff. We process payroll for the consumers employees, process all Federal and State taxes, and maintain all Medicaid required staff training certifications. The Arc of Oakland County served as Fiscal Intermediary for over 1,650 individuals in 2017.

Events & Fundraising

Fund-raising is an integral part of The Arc of Oakland County because monies must be raised to supplement agency income for existing, ongoing programs. We appreciate and thank everyone for their continued support and generosity.

Annual Run Challenge



Oakland County presents a donation challenge to the agency's members and friends. After running and raising money for The Arc for several years, Tom Kendziorski, The Arc of Oakland County's Executive Director, has hung up his running shoes and passed the baton to Kevin Knoblock, a Special Education Teacher, who will continue in the tradition of running and raising money for The Arc of Oakland County!

On Sunday, September 24, 2017, Kevin completed the Brooksie Way Half Marathon with an impressive time of 1 Hour, 39 Minutes, and 08 Seconds. He placed 6th in his division of men 30 - 34 years old.

Although the 2017 goal for the Annual Marathon Challenge was \$15,000 through pledges and donations, we are happy to announce that after expenses we raised \$9,363.75 in donations.

Dove Awards Presentation



The Arc of Oakland County recognizes persons who have made significant contributions on behalf of or for persons who have an intellectual impairment or other developmental disability.

The 47th Annual Dove Awards Presentation was held on March 24, 2017 at the San Marino Club in Troy and over 250 people were in attendance. Eighteen Dove Awards were presented that evening by the Honorary Chairperson and Master of Ceremonies Lt. Governor Brian Calley.

The Arc of Oakland County would also like to thank the following individuals, companies, and organizations for their continued support:

The Southeastern Michigan Knights of Columbus Councils

PLATINUM SPONSOR (\$1,000):

Barron, Rosenberg, Mayoras & Mayoras, P.C., MGM Grand Detroit, MORC, Inc., The Village of Rochester Hills, John Keegan / The Private Bank (\$750), and Harvey & Carole Rabinowitz (\$700)

GOLD SPONSORS (\$500):

Afia, Ron & Pam Cheli, Civitan Club of Pontiac, John & Bernie Duhoski, S.S. Hans, M.D., P.C., Otlewski & Maloney, P.C., Jerry & Judy Rubin, Mark & Ann Wiedelman, Buss & Company, P.C. (\$350), Wm Sullivan and Son Funeral Home (\$350), Tom & Mary Kendziorski (\$325), and Linda Knox (\$300)

SILVER SPONSORS (\$250):

Dave & Katie Andrea, Button Eddy Kolb & Sorrentino, P.L.L.C., Community Homes, Inc., Expert Care Management Services, Howard J. Gourwitz, Gorman's Home Furnishings, Tom & Christine Lias, Joseph McKeivitz, Richard & Kristine Mitchell, Tom Quakenbush, John P. Schoeffel, Barbara Scott, In Memory of Jennifer Summers, Alex and Rose Marie Adah (\$200), Robert Buzzelli (\$200), Kyle & Penny Canada (\$200), Thomai Gersh (\$160), and Joe & Lisa Kowalski (\$150)

BRONZE SPONSORS (\$100):

A.J. Desmond & Sons, Dolores Baran DDS PC, BorgWarner, Todd & Pat Busick, Vickie Denny, Laura Gannan, Chris & Cathy Gilbert, David & Sondra Loeffler, Randy & Suzanne Marquardt, Bob & Karen Mellott, New Gateways Parents Council, North-Oakland Residential Services, Inc., Joseph Qatsha, Minoti Rajput / Secure Planning Strategies, John Torrone, and Mrs. John Wilcox & Family

FRIENDS (Under \$100):

Kathryn Butler, Larry Cronin, and Dennis & Perry Rexin

Annual Silent Auction



The silent auction was held in conjunction with the 47th Annual Dove Awards Presentation. Several items were listed each in a grouping of similar-interest items that complimented each other. We are pleased to announce that the auction & raffle made over \$11,300.00 that evening. The success of this endeavor and thanks go to everyone who graciously donated.

This year's auction items were donated by the following:

Ale Mary's / Tom's Oyster Bar / Terry's Terrace, Andiamo, Royal Oak, The Art Experience, Astrein's, Creative Jewelers, Bahama Breeze, Mary Banacki, Bigalora, Big Rock Chop House, Bill's, The Bird and the Bread, Blackfinn Ameripub, Bordine's, Tracy Browning, Buddy's Pizza, Café ML, California Pizza Kitchen, Carl's Golfland, Steve Chulig, Comcast, Community Housing Network, Cookies by Design, Cranbrook, Academy of Art & Art Museum, Cranbrook Institute of Science, The Dearborn Inn, Vickie Denny, Detroit Institute of Arts, Detroit Princess Riverboat, Detroit Symphony Orchestra, Detroit Zoo, Edward Street Dental, Emagine Entertainment, English Gardens, Fieldstone Winery, Fox Sports, Frames Unlimited, Laura Gannon, John & Lynn Gideon, Goldfish Swim School, Gordon Food Service, Gorman's Home Furnishings, Gourdology, Griffin Claw Brewing Company, The Henry Ford Museum / Greenfield Village, Don Hoenig, Holiday Market, Home Depot, Madison Heights, It's A Matter of Taste, Jax Kar Wash, Tom & Mary Kendziorski, Linda Knox, Kona Grill, Joe & Lisa Kowalski, Kroger, Lamphere Center, Meghan Leavy / Columbia Sportswear, Leon & Lulu, Tom & Christine Lias, Lockhart's BBQ, Lowes, Madison Heights, Maria's Restaurant, Mark Ridley's Comedy Castle, Massage Envy, West Bloomfield, Joseph McKeivitz, McMillin Tours, Meadow Brook Hall at Oakland University, Meadow Brook Theatre, Karen Mellott, The Melting Pot, MGM Grand Detroit, Michigan Opera Theatre, Morley Candy Makers, Joe & Allison Murowany, New Horizons Rehabilitation Services, Inc., Oakland County Parks & Recreation, Olympia Entertainment, Painting With A Twist, Panera Bread, The Parade Company, Pewabic Pottery, Elizabeth Pichette, PRP Wine International, Harvey & Carole Rabinowitz, Roadside B&G, Royal Oak Golf Center, Jerry & Judy Rubin, Simply Good Kitchen, Skate World of Troy, Slows BAR BQ, Somerset Inn, Specialties Showroom, Stagecrafters, Starbucks, Robert & Francine Stern, Sweet Lorraine's, Jaclyn Tamm, Tappers Diamonds & Fine Jewelry, Toyology, Trader Joe's, Troy Dental Care, Wayne State University Maggie Allesee Department of Theatre and Dance, Westin Book Cadillac Detroit, Wheelhouse Detroit, Robert White, The Whitney, Mark & Ann Wiedelman, WXYZ - Channel 7, and Lee Yambura

Weight Watchers Program



The Arc of Oakland County sponsored Weight Watchers program for persons with special needs is held every Tuesday evening at the Big Beaver United Methodist Church at 5:30 p.m. and 6 p.m. Class participants pay a reduced initiation fee and reduced rate under a Weight Watchers Scholarship Program. On average, there are about 25 people enrolled in this inclusive program. It is open to family members, and aides assisting the person(s) with special needs at the same reduced rate.

Membership

Membership Services are coordinated through a member of the staff and, in part, by The Arc of Oakland County's outstanding volunteer, Mary Banacki. Ms. Banacki updates membership renewals, records new memberships, writes membership receipts twice monthly. Our goal has been 2,000 members and we finished 2017 with 1,094 members. Our best ever!

Committee Participation

Members of The Arc of Oakland County staff are actively involved and participate on the following committees: Oakland County Regional Interagency and Consumer Council Committee (RICC); Oakland Community Health Network (OCHN) Consumer Advisory Committee; OCHN Self-Determination Administrative Committee; Macomb-Oakland Regional Center, Inc. Behavioral Supports Committee; The Arc Michigan Conference of Executives of The Arc; The Arc Michigan Governmental Affairs Committee, and Finance Committee; The United Way for Southeastern Michigan; and, Macomb Oakland Regional Center, Inc. Providers.

Board Members of The Arc of Oakland County also participate on Oakland Schools Parent Advisory Committee.

Staff

Thomas F. Kendziorski, Esq.
Executive Director

Megan L. Arnold
Fiscal Intermediary

Niki R. Becker
Fiscal Intermediary

Megan E. Brosky
Fiscal Intermediary

Tracy M. Browning
Fiscal Intermediary

Patricia A. Busick
Fiscal Intermediary

Penny J. Canada
Staff Advocate

Kathleen J. Chutorash
Fiscal Intermediary

Bernadette L. Duhoski
The Forever Plan Monitor

Lynn M. Gideon
Office Manager, Comptroller

Monica P. Goerg
Fiscal Intermediary

Monica M. Knoblock
Fiscal Intermediary

Kiesha D. Lawton
Administrative Assistant

Diane M. McDaniel
Fiscal Intermediary

Allison M. Murowany
Public Relations, Development

Elizabeth R. Pichette
Fiscal Intermediary

Board Of Directors

David Loeffler, DVM, Ph.D., President

Tom Quakenbush, 1st Vice President

Ronald Cheli, Esq., 2nd Vice President

Suzanne Marquardt, Secretary

Jerry Rubin, Treasurer

Tom Lias, Past President

Delegates-at-Large

Michael Bartnik, Esq.
Tim Hatfield
Linda Knox
Lisa Kowalski
Karen Mellott
Randall Meono
Barbara Scott
John Torrone
Ann Wiedelman

Statements of Activities

YEAR ENDED DECEMBER 31, 2017

(with summarized financial information for the year ended December 31, 2016)

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>2017 Total</u>	<u>2016 Total</u>
REVENUE AND SUPPORT					
Fundraising revenue:					
Special events	\$ 75,624	\$ —	\$ —	\$ 75,624	\$ 70,670
Less direct expenses	(20,110)	—	—	(20,110)	(17,873)
Net fundraising revenue...	55,514	—	—	55,514	52,797
Program services:					
Monitoring	3,862	—	—	3,862	7,700
Forever Plan	35,227	—	—	35,227	30,236
Fiscal Intermediary	1,040,624	—	—	1,040,624	1,041,858
Legal services	11,560	—	—	11,560	23,244
Support:					
Grants	24,333	—	—	24,333	48,167
Contributions	40,599	—	—	40,599	233,597
Membership dues	54,021	—	—	54,021	54,765
Investment activity:					
Interest and dividends	35,451	—	—	35,451	34,886
Realized and unrealized net gain (loss) on investment	78,098	—	—	78,098	21,127
Loss on disposal of equipment (165)	—	—	(165)	—
Insurance settlement	—	—	—	—	19,449
Net assets released from program restrictions	—	—	—	—	—
Total revenue and support	1,379,124	—	—	1,379,124	1,567,826
EXPENSES					
Program services	1,229,324	—	—	1,229,324	1,205,356
Management and general	80,573	—	—	80,573	84,763
Total expenses	1,309,897	—	—	1,309,897	1,290,119
CHANGE IN NET ASSETS	69,227	—	—	69,227	277,707
Net Assets - Beginning of year	<u>2,966,414</u>	<u>—</u>	<u>—</u>	<u>2,966,414</u>	<u>2,688,707</u>
Net Assets - End of year	<u>\$ 3,035,641</u>	<u>\$ —</u>	<u>\$ —</u>	<u>\$ 3,035,641</u>	<u>\$ 2,966,414</u>

Statements of Cash Flow

YEARS ENDED DECEMBER 31

	<u>2017</u>	<u>2016</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Cash received from events and program services	\$ 1,173,899	\$ 1,186,489
Cash received from grantors, contributors, and members.....	118,953	336,529
Fiscal Intermediary receipts.....	19,552,905	25,986,126
Fiscal Intermediary disbursements	(19,968,124)	(27,147,223)
Cash paid to suppliers and employees	(1,289,153)	(1,293,876)
Interest and dividends received.....	<u>35,451</u>	<u>34,886</u>
Net cash used in operating activities	(376,069)	(897,069)
CASH FLOWS FROM INVESTING ACTIVITIES		
Proceeds from sale of investments.....	217,103	394,248
Purchase of investments.....	(255,926)	(425,676)
Purchases of equipment and software.....	<u>(10,458)</u>	<u>(82,580)</u>
Net cash used in investing activities	(49,281)	(114,008)
NET DECREASE IN CASH AND CASH EQUIVALENTS		
	(425,350)	(1,011,077)
Cash and Cash Equivalents – Beginning of year	<u>2,285,274</u>	<u>3,296,351</u>
Cash and Cash Equivalents – End of year	<u>\$ 1,859,924</u>	<u>\$ 2,285,274</u>
SUMMARY – CASH AND CASH EQUIVALENTS		
Restricted for Fiscal Intermediary.....	\$ 1,410,671	\$ 1,057,582
Permanently restricted	—	—
Unrestricted	<u>449,253</u>	<u>1,227,692</u>
	<u>\$ 1,859,924</u>	<u>\$ 2,285,274</u>

Statements of Cash Flows Continued

YEARS ENDED DECEMBER 31

	<u>2017</u>	<u>2016</u>
<i>RECONCILIATION OF CHANGE IN NET ASSETS TO NET CASH PROVIDED BY OR USED IN OPERATING ACTIVITIES</i>		
Change in net assets.....\$	69,227	\$ 277,707
Adjustments to reconcile increase or decrease in net assets to net cash provided by or used in operating activities:		
Depreciation and amortization.....	60,274	40,962
Loss (gain) on disposal of equipment.....	165	—
Net realized and unrealized (gain) loss on investments...(78,098)	(21,127)
Changes in:		
Receivables	5,150	(6,667)
Prepaid expenses	(27,371)	8,950
Undistributed Fiscal Intermediary funding.....(415,219)	(1,161,097)
Accounts payable.....	7,606	(5,053)
Accrued payroll and related taxes	<u>2,197</u>	<u>(30,774)</u>
<i>Total adjustments</i>	<u>(445,296)</u>	<u>(1,174,776)</u>
<i>NET CASH USED IN OPERATING ACTIVITIES</i>	<u>(\$ 376,069)</u>	<u>(\$ 897,069)</u>

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Achieve with us.[®]