



The Arc[®]

Oakland County

Serving persons with intellectual and
developmental disabilities since 1967

ANNUAL REPORT

2015



Oakland County

Serving persons with intellectual and developmental disabilities since 1967

Fellow Members and Friends of The Arc of Oakland County:

We are pleased to present our 2015 Annual Report for The Arc of Oakland County. In this report you will find information regarding The Arc's goals, history and activities over the past year.

As we approach our 50th year of service we would like to give a special recognition to our Executive Director, the Management and all our associates who have so capably executed the very essence of The Arc's mission statement which is to provide a commitment to secure for all people with intellectual and other developmental disabilities, and to realize their goals of where they learn, play and live. The Arc assists people with special needs by helping them obtain appropriate education, work opportunities, living arrangements and medical and legal assistance. The Arc continues to use electronic media to provide its members, consumers and friend's greater access to The Arc, its programs and activities. In these times of reduced funding from governmental agencies, The Arc has been a key player in keeping the public informed and knowledgeable about issues that would directly affect consumers and their families.

As the Arc continues to be a major force in the area of advocacy for consumers and their families in matters of education, financial assistance, estate planning, trust administration and residential services, we must also look to the future to serve those in need.

To that end, the board of directors has recently announced two new initiatives. One, to formally change the name of our Lifetime Advocacy Program, The Etheridge Plan, to The Forever Plan. Two, the announcement of a \$50,000 challenge in honor of our upcoming 50th Anniversary. The funds from our \$50,000 challenge will be used to enhance The Forever Plan program and its services. We look forward to sharing more information shortly on this very exciting service initiative.

The Arc continues to maintain its financial stability by vigorous fundraising, grants, program services and our ongoing role as Fiscal Intermediary for MORC.

We wish to thank our volunteer Board of Directors, who have devoted many hours to make this a truly viable and impactful organization. Also, we want to thank our members, benefactors and friends for your outstanding support in 2015. We truly appreciate each of your efforts.

We look forward to 2016, our new service incentives, and our continuing success in providing the highest level of service to those in need.

Respectfully,

Tom Lias

Tom Lias
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 2015 at 1,055. We also have an ancillary list of friends and supporters of approximately 110.

The Arc of Oakland County is directed by a fifteen member Board of Directors and its professional staff of thirteen: 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; E-Plan Monitor; and, seven 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 will also be uploaded in the future.

Systems Advocacy

The Arc of Oakland County served around 2,300 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*); and, (4) the Annual income Tax Guide.

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 Etheridge Plan

The Etheridge Plan (EPLAN), a lifetime, comprehensive advocacy program, is dedicated to program development and expansion, and the monitoring of participants. This program presently serves 20 individuals. 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 EPLAN is an individualized contractual agreement that requires membership in The Arc of Oakland County. The Etheridge 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.

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

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 four 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 altered. This time it is all about person-centered planning and review of the person-centered planning process. This will include participating in local site reviews, training on person-centered planning and reviewing the actual plans that have restrictions.

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 2015.

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



Every year, The Arc of 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 27, 2015, Kevin completed the Brooksie Way Half Marathon with an impressive time of 1 Hour, 36 Minutes, and 31 Seconds. He placed 12th in his division of men 30 - 34 years old.

The 2015 goal for the Annual Marathon Challenge was \$15,000 through pledges and donations. We are happy to announce that we raised over \$13,500.00 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 45th Annual Dove Awards Presentation was held on April 17, 2015 at the San Marino Club in Troy and over 290 people were in attendance. Seventeen Dove Awards, including a Lifetime Achievement Award, were presented that evening by the Honorary Chairperson and Mistress of Ceremonies Deana Centofanti from Fox 2.

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):

Macomb-Oakland Regional Center, Inc., Mark & Ann Wiedelman (\$750), and Otlewski & Maloney, PC (\$550)

GOLD SPONSORS (\$500):

Cheli, Lyshak & Pohl, P.L.C., Civitan Club of Pontiac, Collins, Buri & McConkey, LLP, S.S. Hans, M.D., P.C., The Law Office of Gourwitz and Barr, P.L.L.C., Harvey & Carole Rabinowitz, Jerry & Judy Rubin, Ed, Mark, Janet & Marian Sherlitz, Buss & Company, P.C. (\$350), Tom & Mary Kendziorski (\$325), Wm Sullivan & Son Funeral Home (\$300), and ZDT Networks, LLC (\$300)

SILVER SPONSORS (\$250):

Alex & Rose Marie Adah, David & Katie Andrea, The Center for Special Needs Planning, Community Homes, Inc., Expert Care Management Services, Gorman's, Dennis, Jo & Perry Rexin, John P. Schoeffel, Bob, Judi & Jenni Summers, The Village of Rochester Hills, Jeff & Katie Winkler, Joe & Allison Murowany (\$220), Gloria Edna Brown (\$200), Robert Buzzelli (\$200), Jeff & Vickie Denny (\$200), John & Bernie Duhoski (\$200), Lynn Wert (\$200), Cary & Thomai Gersh (\$150), Valenziano Family 333 (\$150), and Tom & Chris Lias (\$120)

BRONZE SPONSORS (\$100):

A. J. Desmond & Sons, Kyle & Penny Canada, Lon & Doris Jackson, Maggie Knepp, Joe & Lisa Kowalski, David & Sondra Loeffler, New Gateways Parents Council, Joseph & Linda Qatsha, Barbara Scott, Robert & Francine Stern, John Torrone, and Milton Wohl, CPA, PC

FRIENDS (Under \$100):

Larry & Lynn Cronin (\$50), Ed & Marlene Glac (\$50), Paul Ilg (\$50), Linda Knox (\$60), Gary & Lisa Murrell (\$50), Gayle & Gerald Olszewski (\$35), Steven Raphael (\$50), and Dorothy Smith (\$50)

Annual Silent Auction



The silent auction was held in conjunction with the 45th 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 made over \$11,000.00 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:

Andiamo, Royal Oak, The Art Experience, Arthur Murray Dance Studio, Astrein Jewelers, Bahama Breeze, Beach House Day Spa, Beans & Cornbread: A Soulful Bistro, Blackfinn Ameripub, Bordine's, Buddy's Pizza, Pat Busick, Kathryn Butler, Carl's Golfand, Carol Lewis Day Spa, CBS-TV, Estelle Chulig, Lindsay Collis, Comcast - Jim Murphy, Community Housing Network, Cookies by Design, Costco, Cranbrook Art Museum, Cranbrook Institute of Science, The Dearborn Inn, Jeff & Vickie Denny, Detroit Institute of Arts, Detroit Pistons, Detroit Princess Riverboat, Detroit Red Wings, Detroit Symphony Orchestra, Detroit Tigers, Detroit Zoo, Edward Street Dental, English Gardens, Fieldstone Winery, Fox 2 Detroit - Monica Roberts, Fox Sports Detroit - Wayne Joseph, Frames Unlimited, Alice Gerback, John & Lynn Gideon, Goldfish Swim School, Birmingham, Gordon Food Service, Inc., Gorman's, Gourdology, Stan Gramke & New Horizons Rehabilitation Services, Inc., Granite City Food and Brewery, Hagopian World of Rugs, Haig's of Rochester, The Henry Ford, Holiday Market, Home Depot, Madison Heights, iHeartMEDIA Detroit - Christine Briggs, Meghan Leavy Isola - Columbia Sportswear, Michele Jacoby, Jax Kar Wash, Tom & Mary Kendziorski, Kona Grill, Joe & Lisa Kowalski, Kroger, Lamphere Center, Leon and Lulu, Tom & Chris Lias, Lowes, Madison Heights, Lucky Strike, Novi, Lucido Fine Jewelry, Mark Ridley's Comedy Castle, Randy & Suzanne Marquardt, Massage Envy, West Bloomfield, Joseph McKeivitz, McMillin Tours, Meadow Brook Hall, Meadow Brook Theatre, Bob & Karen Mellott, The Melting Pot, Troy, MGM Grand Detroit, Michigan Science Center, Morgan Virginia Photography, Joe & Allison Murowany, Oakland County Parks & Recreation, Painting With a Twist, The Parade Company, Pewabic Pottery, Robert & Martha Perske, PF Chang's, Elizabeth Pichette, Prestige Portraits, PRP Wine International, Puppet Art, Steve Raphael, Roadside B&G, Rochester Ballroom, Royal Oak Golf Center, The Royal Park Hotel, Jerry & Judy Rubin, Sanders Candy, Skate World of Troy, Slow's Bar BQ, Somerset Inn / Crumpets, Stagecrafters, Starbucks, Troy, Sterling Inn, Streetside Seafood, Sweet Lorraine's, Jaclyn Tamm, Tappers Diamonds & Fine Jewelry, Lori Thomas, Thrifty Florist, Huntington Woods, Robert Tokar, Town Tavern, Toyology, Trader Joe's, Vera Bradley, Troy, Wayne State University Maggie Allesee Department of Theatre and Dance, WDIV Local 4 - Jeff Elwood, Wheelhouse Detroit, The Whitney, Mark & Ann Wiedelman, Lawrence & Jeanine Williamson, WOW, WTVS/PBS - Bob Raymond, WXYT-FM - Courtney Olbrich, WXYZ - Brian Campbell, WXYZ - Dave DiPonio, 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 2015 with 1,055 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 County Community Mental Health Authority (OCCMHA) Consumer Advisory Committee; Oakland County CMHA 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 and the Oakland CMHA Developmental Disabilities Advocates Committee.

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

Staff

Thomas F. Kendziorski
Executive Director, Attorney at Law

Niki R. Becker
Fiscal Intermediary

Patricia A. Busick
Fiscal Intermediary

Penny J. Canada
Staff Advocate

Kathleen J. Chutorash
Fiscal Intermediary

Bernadette L. Duhoski
E-Plan Monitor

Lynn M. Gideon
Office Manager, Comptroller

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

Jaclyn C. Tamm
Fiscal Intermediary

Board Of Directors

Tom Lias, President
David Loeffler, DVM, PhD., 1st Vice President
Ronald Cheli, Esq., 2nd Vice President
Jerry Rubin, Secretary
Suzanne Marquardt, Treasurer
Karen Mellott, Past President

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Michael Bartnik, Esq.
Gloria Edna Brown
Vickie Denny
Linda Knox
Lisa Kowalski
Tom Quakenbush
Barbara Scott
John Torrone
Ann Wiedelman

Statement of Activities

Years Ended December 31, 2015

(with summarized financial information for the year ended December 31, 2014)

	Unrestricted	Temporarily Restricted	Permanently Restricted	2015 Total	2014 Total
REVENUE AND SUPPORT					
Fundraising revenue:					
Special events	\$ 71,729	\$ —	\$ —	\$ 71,729	\$ 69,148
Less direct expenses	(18,316)	—	—	(18,316)	(18,334)
Net fundraising revenue	53,413	—	—	53,413	50,814
Program services:					
Monitoring	7,200	—	—	7,200	1,625
Etheridge Plan	32,644	—	—	32,644	32,513
Fiscal Intermediary	978,584	—	—	978,584	911,060
Legal services	42,144	—	—	42,144	47,372
Support:					
Grants	47,720	—	—	47,720	36,840
Contributions	50,082	—	—	50,082	64,219
Membership dues	52,225	—	—	52,225	50,869
Investment activity:					
Interest and dividends	37,607	—	—	37,607	40,813
Realized and unrealized net gain on investment	(38,674)	—	—	(38,674)	6,440
Loss on disposal of equipment	—	—	—	—	(2,504)
Net assets released from program restrictions	12,379	(1,879)	(10,500)	—	—
Total revenue and support 1,240,061		1,275,324	(1,879)	(10,500)	1,262,945
EXPENSES					
Program services	1,027,686	—	—	1,027,686	966,164
Management and general	78,328	—	—	78,328	98,268
Total expenses	1,106,014	—	—	1,106,014	1,064,432
CHANGE IN NET ASSETS	169,310	(1,879)	(10,500)	156,931	175,629
Net Assets - Beginning of year	2,519,397	1,879	10,500	2,531,776	2,356,147
Net Assets - End of year	\$ 2,688,707	\$ —	\$ —	\$ 2,688,707	\$ 2,531,776

Statement of Cash Flows

Years Ended December 31, 2015

	<u>2015</u>	<u>2014</u>
CASH FLOWS FROM OPERATING ACTIVITIES		
Cash received from events and program services	\$ 1,119,337	\$ 1,046,293
Cash received from grantors, contributors, and members.....	150,027	151,928
Fiscal Intermediary receipts.....	28,254,807	29,862,717
Fiscal Intermediary disbursements.....	(28,626,272)	(30,042,144)
Cash paid to suppliers and employees	(1,084,824)	(1,050,286)
Interest and dividends received	<u>37,607</u>	<u>40,813</u>
Net cash provided by (used in) operating activities	(149,318)	9,321
CASH FLOWS FROM INVESTING ACTIVITIES		
Proceeds from sale of investments.....	506,402	528,745
Purchase of investments.....	(546,307)	(549,658)
Purchases of equipment and software	<u>(167,332)</u>	<u>(42,616)</u>
Net cash used in investing activities	(207,237)	(63,529)
NET DECREASE IN CASH AND CASH EQUIVALENTS	(356,555)	(54,208)
Cash and Cash Equivalents – Beginning of year	<u>3,664,320</u>	<u>3,718,528</u>
Cash and Cash Equivalents – End of year	<u>\$ 3,307,765</u>	<u>\$ 3,664,320</u>
SUMMARY – CASH AND CASH EQUIVALENTS		
Restricted for Fiscal Intermediary	\$ 2,055,094	\$ 2,558,518
Permanently restricted.....	12,314	10,500
Unrestricted	<u>1,240,357</u>	<u>1,095,302</u>
	<u>\$ 3,307,765</u>	<u>\$ 3,664,320</u>

Statement of Cash Flows Continued

Years Ended December 31, 2015

	<u>2015</u>	<u>2014</u>
RECONCILIATION OF CHANGE IN NET ASSETS TO NET CASH PROVIDED BY OR USED IN OPERATING ACTIVITIES		
Change in net assets	\$ 156,931	\$ 175,629
Adjustments to reconcile increase or decrease in net assets to net cash provided by or used in operating activities:		
Depreciation and amortization	20,618	23,701
Loss on disposal of equipment	—	2,504
Net realized and unrealized (gain) loss on investments	38,674	(6,440)
Changes in:		
Receivables	(805)	(12,921)
Prepaid expenses	613	1,234
Undistributed Fiscal Intermediary funding	(371,465)	(179,427)
Accounts payable	2,590	(199)
Accrued payroll and related taxes	4,443	6,922
Deferred revenue	(917)	(1,682)
Total adjustments	(306,249)	(166,308)
NET CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES	<u>(\$ 149,318)</u>	<u>\$ 9,321</u>

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Achieve with Us.