



ANNUAL REPORT TO SPONSORS

November 5, 2016

The Board of Directors presents the following report on the status of By Their Side.

Membership

By Their Side has 265 members. 68 members receive lifelong advocacy services following the death of their sponsors/parents, and received an annual assessment visit in the past year. 197 members remain inactive. This year, one member newly began receiving lifelong services and one member passed away. The Board approved four new applications for membership. 35 members received additional visits ranging from quarterly to weekly, plus monitoring, through an Annual Advocacy Plan; 19 of these have a living parent/sponsor.

Advocacy Services

In October 2016, By Their Side was presented a Family Support Award by the Baltimore Commission on Disabilities and received a Citation from the Maryland Legislature. By Their Side's experienced advocates assist members as needed, ranging from small preferences to life changes. For example, advocates have:

Helped pursue individual interests by securing craft supplies, arranging participation in art exhibits and arranging attendance at Orioles games and vacations.

Carried forward advocacy concerns and wisdom of parents who are now gone, such as relating a parents' report of a hip replacement years earlier that was not intended to last a lifetime, so that the hip was evaluated and revision surgery provided.

Protected rights by advocating for the use of positive reinforcement in a behavior plan rather than restricting outings, and reporting allegations of verbal abuse to the residential agency and licensing authority.

Planned to address changing life needs by locating a new residential agency when requested, exploring interest in retirement, and advocating for evaluation of a new communication device when manual dexterity limited ability to use current device.

Recommended evaluation by specialists, such as involving a professional with experience in both Alzheimer's and developmental disabilities, a geriatrician for an aging individual with increasing medical needs, and an assistive technology professional to properly fit a wheelchair.

Monitored and followed up to assure needs were addressed, including medical follow up and reapplication for benefits when dropped.

Assisted siblings near and far - as local eyes and ears, sounding board, and partner in advocacy, for example visiting while a sibling was on sabbatical, assessing financial needs, and providing an overview of Trusts and resources for someone struggling with spenddown.

And assisted parents to plan for the future by working with DDA to assure 1:1 funding was authorized for long term rather than short term, exploring future residential options in State funded and private settings, attending IP meetings to transition advocacy, and providing estate planning resource referrals.

Financial

By Their Side's finance committee continues to closely monitor financial reserves for future services. The membership fee for lifelong advocacy remains \$3000 for sponsors under 65, \$3500 for sponsors 64-74, and \$4000 for sponsors 75 and over. The fee for Advocacy plan services increased to \$85/hour.

As of September 30, 2016, By Their Side's assets totaled \$1,138,180. By Their Side's annual audit of financial records for fiscal year ending June 30, 2016, is in process by Naden/Lean, LLC. The 2015 audit found the financial statements "present fairly, in all material respects, the financial position of By Their Side, Inc as of June 30, 2014 and 2015, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States." By Their Side's investments are managed by Harbor Investment Advisory. Operating funds are drawn from investment income and undesignated donations. This past fiscal year, By Their Side received \$10,000 from the Martin Lampe Estate, \$10,000 from the O'Neil Family Foundation, and \$5,000 final distribution from the Laura and John Birkland Trusts.

Personnel

Employees include Kathy Vecchioni, Executive Director (20 hours a week) and Personal Advocate; Beverly Rill, Financial Coordinator (16 hours a month) and Personal Advocate; and Sandie French, Administrative Assistant (8 hours a week.) Twelve experienced contractual Personal Advocates also provide advocacy services—Nancy Berger, Kari Borgealt, Ann Brady, Susan Buehl, Karen Gipson, Paul Mysak, Cathy Raggio, Beatrice Rodgers, Joan Rumenap, T. Gail Singletary, Rachel Sye, and Portia Willis—for a total of fourteen Personal Advocates located throughout Maryland. Families can read about the qualifications of By Their Side advocates on www.bytheirsideside.org.

Governance

By Their Side is governed by a volunteer Board of twelve Directors that includes five parents, two siblings, and two self-advocates. Directors serving during Fiscal Year 2017 include: Mark L. Wagner, DMD, President; Kenneth Moore, Vice President; Jeffrey Dahlka, Sr., Treasurer; Paula Mattson-Sarli, Secretary; Joan Chevalier; George Failla, Jr, Esq., Craig S. Hebert; Philip Levinson, DDS; Mary Scott; Judy Volkman, and Tracy Wright. Joan Kolobielski is Director Emerita. *The Directors welcome sponsors or community members from different professions and geographic areas, to serve on the board or on a board committee.*

Respectfully submitted,



Mark L. Wagner, DMD
President