

## ANNUAL REPORT TO SPONSORS April 29, 2006



The following is a report on the status of MTRC, Inc. from the Board of Directors as of April 29, 2006.

The Audit of MTRC's financial records as of June 30, 2005, was finalized by Walpert & Wolpoff, LLP, in December 2005. Their audit found "the financial position of MTRC as of June 30, 2005, and the results of its operations and changes in fund balances for the year then ended, in conformity with generally accepted accounting principles." MTRC's investments are

managed by Deutsche Bank Alex. Brown. Operating funds are obtained from the investment income and from undesignated donations. The MTRC Investment Policy's goal of a 7-8% return was achieved.

Luanne Frebertshouser, RN, LSWA, MS, continues to work under a contractual arrangement as a consultant for MTRC. Three Case Managers, Linda Heinsohn, Sandy Yingling, and Marilyn Folus, provide services to the active clients and perform case management for the Supplemental Service contracts. Beverly Rill's position has changed to Executive Director. Charity Reed is MTRC's part time Administrative Assistant.

The MTRC membership totals 282 as of April 29, 2006. Of this number, 220 are vested (have completed their membership payment), 9 are part of the Original Trust which provided payment of the membership fee through a Will provision, and 53 are receiving active services due to the death of their sponsors. The deaths of 6 clients have been reported to MTRC since October 2004. Four applications for membership have been approved.



The active clients are in the process of being visited by either a volunteer or one of the MTRC Case Managers. Reports are given to the closest relative, trustee, or guardian for their review and follow up instructions. Additional visits, attendance at planning meetings, and concentrated services performed by the MTRC professionals are billed on a fee-for-service basis through the Supplemental Services program. The MTRC Staff has updated contact information for all the families. Those families not responding by mail were contacted by telephone to update the files. In addition, staff will be making sure our clients and/or their guardians have signed "Release of Information" forms for future use.



Board committees include the Educational and Finance Committees. The committees continue to look for grants and funding for special projects. This past year grants were received from the Citigroup Foundation and Deutsche Bank Americas Foundation to distribute educational material in the state of Maryland. A mailing of relevant material was sent to attorneys,

financial planners, and trust companies during the summer of 2005. Another mailing is planned for the summer of 2006. The Directors have attended several Transition Workshops and other parent groups to spread the word about MTRC's services. MTRC continues to provide educational information regarding care plans, estate planning, financial planning, and resources to contact for services.

Kim Knapp chaired two fundraisers – the “Entertainment Book Campaign” and “AdSense”. MTRC continues to earn money through AdSense every time someone uses the Google Search engine on the MTRC Web Site at [www.mdtrc.org](http://www.mdtrc.org), or when someone clicks on the ads on our pages. The Finance Committee also asked for gifts of stock and matching grants through its Annual Fund Drive appeal letter in December 2005.

The Scholarship Fund has been expanded and is available to assist families with the payment of MTRC's application fee. One family was awarded a scholarship in 2005.

In January, 2006, the Board of Directors approved shortening the name to MTRC, Inc. MTRC respects the right of individuals with developmental disabilities not to be called ‘retarded’ because of its negative implications. MTRC, Inc. continues to provide the same advocacy services and resource information for our families.

Kim Knapp updates the MTRC website regularly. The site is now easier to access for people with disabilities. New literature, the name change, and current newsletters have been added. The Board is in the process of adding related links and requesting our website be included as a link at other sites. The web site is located at <http://www.mdtrc.org>.



\*\*Handouts: [Residential Visit Check List](#)  
[Meeting Report Form](#)

## GOVERNANCE

The MTRC program continues to be governed by a volunteer Board of Directors. Directors serving during the Fiscal Year 2005 and 2006 include: Marsha S. Carow, President; Jeffrey Dahlka, Sr; Treasurer; Kim Knapp, Secretary; Victoria L. Grace, Esquire; Joan Kolobielski; Colleen Sinclair Prosser, Esquire; Dean Hoffman; Margaret Ulle; and William D. Ward. The Directors constantly search for individuals from different professions who are willing to serve on the board or act as support for the various board committees.

Respectfully submitted,  
Marsha S. Carow, LCSW-C  
President, FY 2005-06

Click here to see [photos](#) from our Annual Meeting.