



Lifelong Advocates for Marylanders with Developmental Disabilities ®

ANNUAL REPORT TO SPONSORS

November 1, 2014

The Board of Directors presents the following report on the status of By Their Side, Inc. as of September 30, 2014.

Membership

By Their Side has 273 members. Of these, 65 members currently receive advocacy services following the death of their sponsors and 198 members have living sponsors. Since the sponsor's meeting last year, services have newly begun for five members following the passing of their sponsor, and three members have passed away. Six new applications for membership and Lifelong Advocacy Services have been approved. 39 members currently receive additional visits and monitoring through Advocacy Plan Services; 19 of these have an involved sponsor/parent who is transitioning advocacy responsibilities, representing an increase over past years.

Advocacy Services

In the past year, all members receiving Lifelong Advocacy Services due the passing of their sponsor received an assessment visit, usually in conjunction with the annual planning meeting. Follow up was provided to address needs related to health and safety as well as monitoring that preferred activities were provided as planned with the team. Updates were provided to trustees or siblings when available.

Members receiving tailored Advocacy Plan Services received additional visits and monitoring contacts as arranged by families or trustees, as well as assistance with unexpected needs. Advocates assisted siblings by providing updates, monitoring resolution of issues, and consulting on strategies to address concerns. Advocates provided Trustees with information regarding purchases to address financial needs and preferences. This year, sponsors were assisted with strategies to address disagreements with providers, recruit in home staffing, select a resource coordinator, appeal DDA service denial, and were provided with service referrals including special needs trust attorneys and trustees.

Board Committees

Over the past year, the Board of Directors has worked to address goals related to outreach to Maryland families and family support. Outreach has focused on parent gatherings and is now being expanded to introduce By Their Side services to additional professionals who encounter families in need of advocacy assistance. Over the past year, By Their Side staff and siblings worked in partnership with Arc Maryland and the Maryland Developmental Disabilities Council to establish the Maryland Sibling Network via forums and facebook discussion groups. This year, a time-limited focus group will be established with partners to explore future-planning needs and resources for families with only one child. Sponsors are invited to serve on this group. The Luanne Freburtshouser Family Advocacy Support Fund has been established to reduce the cost

to parents for short-term advocacy to address a specific need. A grant will be sought this year to continue this fund.

By Their Side's finance committee continues to closely monitor financial reserves for future services. The actuarial study to project future needs and expenses was updated. The Board adjusted membership fees accordingly. The current membership rate is \$3000 for sponsors under 65, \$3500 for sponsors 64-74, \$4000 for sponsors 75 and over. Advocacy plan services are \$84/hour, discounts for more frequent contacts.

The annual audit of By Their Side's financial records for fiscal year ending June 30, 2014, is in process by Naden/Lean, LLC. The 2013 audit found the financial statements "present fairly, in all material respects, the financial position of By Their Side, Inc as of June 30, 2013 and 2012, 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. In summer 2014, By Their Side received a \$151,000 bequest from the Laura and John Birkland Trusts, which is in the process of being invested as a reserve for future services. (The bequest is not reflected in June 2014 growth charts presented at the Annual Meeting.) A \$40,000 bequest was received from the Virginia Safrank Trust in fall 2013, and is invested as a reserve.

Personnel

By Their Side's 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—Nancy Berger, Susan Buehl, Leonard Cohen, Marilyn Folus, Mary Funk, Chris Irving, Paul Mysak, Beatrice Rodgers, Rebecca Rubin, Joan Rumenap, Debbie Willis, and Portia Willis—also provide advocacy services, for a total of fourteen Personal Advocates located throughout Maryland.

Governance

By Their Side continues to be governed by a volunteer Board of Directors. Directors serving during Fiscal Year 2015 include: Mark L. Wagner, DMD, President; Kenneth Moore, Vice President; Jeffrey Dahlka, Sr., Treasurer; Kimberly Breton Iaquina, Secretary; Joan Chevalier, Shannon Hammond, Esq.; Craig S. Hebert; Joan Kolobielski; Martin Lampe, Ph.D; Philip Levinson, DDS; Paula Mattson-Sarli, Esq.; Judy Volkman, and Tracy Wright. *The Directors welcome sponsors or community members from different professions, geographic areas, and segments of the community to serve on the board or on a board committee.*

Respectfully submitted,

Mark L. Wagner, DMD
President, FY 2015