



**REPORT ON IMPLEMENTATION OF THE
*STRATEGIC FRAMEWORK FOR THE FUTURE OF THE ARC, 2010 – 2019***

YEAR TWO: JANUARY 1 – DECEMBER 31, 2011

This report summarizes The Arc's progress in 2011 in implementing the new *Strategic Framework for the Future of The Arc, 2010-2019*.

The information is presented with reference to the relevant goals and strategies, although many of the activities are cross-cutting. Where no specific activities or accomplishments are listed that is not intended to suggest that there was no action taken in support of the particular strategy. Rather, in many cases that strategy was likely advanced through The Arc's general communications and public relations activities, including information distributed through The Arc's website, blogs, social media, as well as through educational programming offered at the annual convention, NCE summer leadership institute and other activities.

Goal I: Infants, children and youth with I/DD have access to the supports and services they need to live in their family homes, to succeed in school and to partake in all of the experiences of childhood.

- Public Policy (PubPol) Group successfully advocated for Medicaid, SSI and Social Security Disability Insurance to be held harmless in the Budget Control Act and the subsequent deliberations of the Super Committee and other committees with jurisdiction over key entitlement and discretionary programs. This included opposing removal of maintenance of effort requirements, block granting, spending caps and other threats.
- Chapter Organizing & Advocacy (CO&A) Group, in collaboration with PubPol Group and Development, Marketing Communications (DM&C) Group developed and implemented new grassroots campaign - Don't Cut Our Lifeline – to prevent dismantling of the system.
- The above two items are hereinafter referred to collectively as DCOL Advocacy.
- PubPol Group successfully advocated to protect Supplemental Security Income (SSI) for children, including arranging family to testify at hearing in Congress.
- PubPol Group advocated for adequate FY 2012 funding for both entitlement and discretionary programs.
- PubPol Group successfully advocated for passage of the Combating Autism Reauthorization Act.

Strategy 1: Increase the availability of early intervention services that are provided in naturally occurring environments.

Strategy 2: Increase the inclusion, participation and integration of students with proper accommodations in their neighborhood schools, as well as in other public and publicly general educational settings

- The Research and Innovations Group (R&I Group) began work on project activities defined in the Dynamic Learning Maps project, a subgrant from the University of Kansas awarded in 2010, to conduct focus groups with families on IEP testing alternatives.
- PubPol Group successfully advocated to defeat an amendment to the Elementary and Secondary Education Act/No Child Left Behind that would have removed the 1% cap on the number of students with disabilities who could be administered alternative assessments.

Strategy 3: Promote best practices in school-to-community transition.

The Arc advanced best practices in school-to-community transition in 2011 through implementation of the The Arc & Walmart Foundation School-to-Community Transition (STC) Project.

- Provided advice and counsel to staff regarding: (a) issues relating to renewal of existing subgrants, (b) selection of new grantees, (c) program evaluation, and (d) preparation for discussions with Walmart Foundation about renewal of funding.
- Obtained multi-year renewal of grant from the May and Stanley Smith Charitable Trust in the amount of \$400,000 over two years to support continuation of the School-to-Community Transition Project.
- STC continues to successfully implement the project, including distribution of \$620,000 in subgrants, addition of information and resources on website and launch of peer learning community, and annual Transition in Action meeting for subgrantees.
- The STC Project serves many other goals and strategies in the Strategic Framework and is referenced with the notation “STC Project” where applicable.

Strategy 4: Eliminate the use of seclusion, aversive interventions and non-emergency restraint of children in schools.

- PubPol Group arranged for The Arc to participate as amicus curiae (“friend of the court”) in Massachusetts case involving the Judge Rotenberg Center and use of aversives.

Strategy 5: Increase the involvement of students with I/DD in the IEP process, including in transition planning.

- STC Project.

Strategy 6: Increase the quality and accessibility of lay and professional advocates to support people with I/DD and their families, including the development of parent advocate and youth self-advocate groups.

Strategy 7: Reach out to and empower parents, siblings and other family members of infants, children and youth with I/DD and provide them access to the information they need, when they need it, across multiple media and modalities

- DCOL campaign.
- The National Initiatives Group, with support of the R&I Group, successfully developed and launched the new National Autism Resource and Information Center. Center activities advance

multiple goals and strategies (referenced below with notation “Autism Now!”). Major activities included website www.autismnow.org, five regional summits attended by approximately 650 people, weekly webinars attended by approximately 3,800 and social media presence reaching more than 150,000. Collectively, more than 1 million people received information from Autism Now!

- Through the efforts of the DM&C Group, communications to a broad audience are now ongoing with The Arc’s website, blog, quarterly print newsletter, *Empower*, and quarterly e-newsletter, *The Arc’s e-Newsletter*. Website enhancements included new or redesigned sections for Public Policy, STC Project, NCE, Resources, Siblings Council.
- ChEx Group subcontracted by Genetic Alliance and assisted with development of an Advocacy Guides for parents whose children are diagnosed prenatally or within the first year of birth with a genetic disorder.
- STC Project

Strategy 8: Actively involve, collaborate with and support other family support/service organizations.

- Working with ChEx Group, negotiated Memorandum of Understanding with the Sibling Leadership Network about joint programming and activities, including new National Sibling Leadership Council within The Arc.
- National Initiatives (NI) Group provided sub-grants to Autism Society of America as part of Autism Now! project.

Goal II: Adults with I/DD have the opportunity to lead lives of their own choosing, free from poverty, to be employed, to reside in the community, and to live independently with ready access to whatever services and supports they need.

- See PubPol Group results under Goal I.
- PubPol Group convened and supported state chapters involved in advocacy on dual eligibles and managed care, including working with DM&C Group to develop dedicated section of website for state chapter use.
- DCOL Advocacy.

Strategy 1: Increase opportunities for integrated employment at fair wages, and self-employment, for people with IDD.

- PubPol Group advocated for appropriate legislative provisions in reauthorization of the Workforce Investment Act, including written comments on "Improving Employment Opportunities for People with Intellectual Disabilities."
- CRIO (AC Caldwell) and Chapter Excellence Group (ChEx) Director (Laurie Ertz) represented The Arc on an ongoing basis with the Alliance for Full Participation relating to its planned 11/11 Summit.

Strategy 2: Increase services and supports necessary for people with IDD to be gainfully employed or self-employed.

- PubPol Group submitted testimony on the reauthorization of the Surface Transportation Act

Strategy 3: Build the capacity and readiness of employers to recruit, hire and retain individuals with I/DD as employees.

- Attended and exhibited at annual conference of U.S. Business Leadership Network, an association of employers committed to expanding competitive employment for people with I/DD. Began follow-up cultivation of relationships with multiple companies.

Strategy 4: Identify and promote best practices in services and supports for people with IDD relating to housing, employment, recreation and other aspects of community participation.

- STC Project
- Worked closely with Board President and Work Group chair to develop and implement plans for new Ad Hoc Work Group on Planned Communities and Other Residential Alternatives, and provide ongoing staff support.

Strategy 5: Increase the availability of affordable and accessible rental housing and home-ownership, including supported housing.

- PubPol Group successfully advocated for FY 2012 appropriation of \$165 million for the Department of Housing and Urban Development's Supportive Housing for Individuals with Disabilities – one of only two HUD programs that received an increase in 2012.

Strategy 6: Increase the availability of personal supports.

Strategy 7: Encourage, assist and support chapters of The Arc to transition from group homes to providing supported living, as well as to assist people with I/DD to live in their own homes in the community with the appropriate supports.

Strategy 8: Encourage, assist and support chapters to transition from segregated day programs and employment to providing support for integrated, community based employment and activities

- Continue discussion with NISH Institute for Economic Empowerment about their promise to provide \$1 million in support for Experiential Learning/Supported Employment Project.

Strategy 9: Support chapters of The Arc to facilitate the community change process necessary to replace the remaining state institutions with community based services and supports.

Strategy 10: Promote and support the growth of self-determination and self-advocacy.

- Provided technical assistance to ASAN on organizational development issues
- Chapter Excellence (ChEx) Group facilitated planning of new National Council of Self-Advocates with the vision of creating a constituency of leaders that represent the full spectrum of ages and abilities across our national chapter network.
- NI Group continues to involve ASAN and SABE as sub-grantees in Autism Now Project.
- ChEx Group continues to implement sub-grant from SAMSHA (via Northrup Grumann) for two-year project to facilitate development of a self-advocacy group for people with Fetal Alcohol Syndrome Disorder (FASD), including exhibiting at three national conferences.
- R&I Group arranged for June 1st assumption of responsibilities for the \$150,000 Medicaid Desk project grant from the Administration on Developmental Disabilities, terminating subcontract relationship with ArcLink, and managed project.
- R&I Group arranged for assumption of related \$38,000 subcontract from SABE for federal Go Voting Access Project and managed project

Strategy 11: Rebalance the Medicaid program so that home and community based services, and family support are mandatory and readily available with consistency and portability from state to state.

- DCOL Advocacy
- PubPol Group provided comments to CMS on section 1115 pilots and demonstrations.
- PubPol Group engaged in ongoing advocacy with CMS, Medicaid and CHIP Payment and Access Commission and other entities regarding impact of coordinated care for dual eligibles with I/DD.

Strategy 12: Improve basic income support systems for people with I/DD and their families, and change requirements applicable to benefits eligibility, to reduce the incidence of poverty.

- PubPol Group worked to support introduction of a new version of the ABLE Act to create tax-exempt savings accounts for families of people with I/DD. Appeared at spoke on behalf of The Arc at press conference announcing introduction of the legislation.
- PubPol Group advocating against repeal of the Community Living Assistance Services and Supports (CLASS), which as part of the Affordable Care Act established a voluntary system of private insurance for long term home and community based services.

Goal III: People with I/DD have the opportunity to participate in civic activities, volunteerism and community service, religion, arts, culture and recreation alongside their peers without disabilities.

Strategy 1: Build the capacity and readiness of civic, cultural, religious, governmental, business and other community organizations to include and support the participation of people with I/DD in their programs and activities.

- R&I Group cultivated relationship with National Inclusion Project (Bubel Aiken Foundation) about possible collaboration focused on integrated recreational programs.

Strategy 2: Increase services and supports necessary for people with IDD to participate in civic, cultural, religious and other community organizations.

Strategy 3: Increase voting by people with I/DD and their participation in the political process.

- CO&A Group, in collaboration with DM&C Group, developed and implemented non-partisan election year activities, with launch at 2011 National Convention.

Strategy 4: Increase the availability of family support, including respite services.

Goal IV: Individual members of the public value, respect and accept people with I/DD as equal members of society.

Strategy 1: Publicize the high rate, as well as specific incidents, of bigotry, discrimination, and victimization of people with IDD.

- Provided input and advice to staff in formulating response via blog, Twitter, Facebook regarding incidents of discrimination against people with I/DD.

Strategy 2: Develop and support chapters of The Arc in implementing testing programs to identify discriminatory practices in housing, employment and instances of unlawful failures to provide accommodation.

Strategy 3: Promote increased public awareness of people with I/DD, their needs issues and concerns.

- Lead author of report, ***Still in the Shadows with Their Future Uncertain: A Report on Family and Individual Needs for Disability Supports (FINDS), 2011***, which served as Executive Summary of results of nationwide survey of Family and Individual Needs for Disability Supports (FINDS).
- Worked closely with R&I Group and University of Minnesota researchers to review and provide input on FINDS Technical Report.
- Worked closely with DM&C Group and public relations consultant, Golin Harris, to develop and implement public relations and media campaign around release of ***Still in the Shadows***, obtaining exposure in more than 25 major media markets, with 330 pieces of coverage reaching a viewership/listenership/circulation of 302,234,283. The top ten placements alone resulted in free coverage valued at more than \$1 million in equivalent paid advertising.
- Conducted 22 satellite media tour interviews and press conference at National Press Club, and media interviews relating to *Still in the Shadows*/FINDS.
- Worked closely with DM&C Group to develop and release our new public service announcements, released in late July 2011, which by 12/31/11 so far have been aired a total of 19,090 times by 270 stations in 123 media markets. While the PSA campaign will continue to run through July 2012, in the first 5 months alone it has reached a “broadcast audience impression” of 225,971,527 with free coverage of our message with an equivalent value of \$2,596,240 in paid advertising.
- Provided advice and counsel to DM&C group to support:
 - Achieve with us! Contest in the summer of 2011 on our Facebook fan page at www.facebook.com/thearcus involved more than 119 contestants and 25,000 voters, increasing our presence in social media. Contest culminated in winner, Tyler Smothers, visiting Capitol Hill where he met with Senators Grassley and Harkin and Congressman Loesback.
 - Special Section in **Time** magazine carried our message to more than 19 million readers.
- Provided input and advice to DM&C Group in development and launch of substantially redesigned website and other public education efforts.
- DM&C Group issued 28 press releases during the year.
- Autism Now! project.

Strategy 4: Monitor the media for negative portrayals and descriptions of people with I/DD in the media and promote more accurate, respectful and positive coverage

- Worked with DM&C Group to formulate and implement response to R-word incidents involving Tracy Morgan, LeBron James, Presidential candidate Michelle Bachman.
- Provided input and advice to staff in formulating response via blog, Twitter, Facebook regarding incidents involving negative portrayal of people with I/DD.

Strategy 5: Promote appropriate education and training of medical professionals, legal professionals, law enforcement officials, teachers, clergy, human resources professionals and others whose conduct impacts the lives and opportunities of people with I/DD.

- PubPol Group arranged for The Arc to participate as amicus curiae (“friend of the court”) in Louisiana case involving a false confession.

Strategy 6: Educate people with I/DD, and their family members, about their rights and provide them the tools and supports to protect their rights where such are being unlawfully denied.

- DCOL Advocacy
- DM&C Group ongoing preparation and dissemination of content via website, print and electronic newsletters, and social media.
- Autism Now! Project
- DM&C and Public Policy Group continue ongoing preparation and dissemination of public policy publications (e.g Capitol Insider, National Policy Matters, Policy Alerts!) and website content. Achieved above industry average open rates for Capitol Insider (20% vs 13%) and Action Alerts (24% vs. 13%).

Strategy 7: Showcase the positive role and contributions of people with I/DD in society.

- The Arc gave the 2nd Image and Inclusion Award at the 2011 National Convention.
- Conducted two television interviews with local Colorado media around National Convention.
- DM&C Group ongoing preparation and dissemination of content via website, print and electronic newsletters, and social media.

Goal V: Quality health education, health promotion and health care are widely available and accessible, enabling individuals to avoid known environmental causes of I/DD and to prevent secondary health problems for people with I/DD.

Strategy 1: Educate the public to avoid environmental agents and behaviors known to cause of intellectual and developmental disabilities.

- ChEx Group developed fact sheet on environmental toxins for distribution in connection with related webinar.

Strategy 2: Increase the availability and accessibility of quality routine and preventative medical, dental, vision and mental health care for people with I/DD.

- Advocate to prevent repeal of Affordable Care Act, including participating as *Amicus Curiae* in U.S. Court of Appeals and U.S. Supreme Court cases.
- PubPol Group advocated before the Institute on Medicine Committee on Development of the Essential Benefits Package under the Affordable Care Act on what habilitation means and why it was included in the essential benefits package, including submitting written comments.
- PubPol Group provided CMS comments regarding health quality measures under Medicaid.
- PubPol Group provided comments to CMS regarding Medicare definition of durable medical equipment.
- R&I Group attended and presented at Health Frontier for Intellectual Disabilities conference. Participating in Health Surveillance of Adults with Intellectual Disabilities Advisory Committee, led by the University of Massachusetts's Center for Developmental Evaluation and Research (CDDER) and the Human Services Research Institute (HSRI) Funded by CDC and NCBDDD.

Strategy 3: Make public and private health insurance universally available to people with I/DD.

- Affordable Care Act advocacy

Strategy 4: Prevent discrimination against people with I/DD in the delivery of health care services

- Affordable Care Act advocacy.

Strategy 5: Build the capacity of medical professionals, and health care organizations, to provide health care services to people with I/DD, including by expanding relevant specialized training.

- Affordable Care Act advocacy.

Goal VI: The Arc is a powerful advocate for people with I/DD, leading a vibrant, engaged and growing movement of people with I/DD, their family members, friends and colleagues, and the nonprofit organizations that serve them, committed to the full inclusion of people with I/DD in society.

- Obtained appointment to the President’s Committee for People with Intellectual Disabilities; participated in two face-to-face meetings and multiple telephone conferences, including co-chairing group responsible for development of PCPID 2011 report to the President.
- DCOL Advocacy
- Successfully managed the dissolution of the Disability Policy Collaboration and the takeover of the entire existing federal public policy operation within The Arc, including retention of existing public policy staff and integrating administrative staff into the Operations Group. Marty Ford was appointed Director of The Arc’s new Public Policy Group.
- Restructured to created new Communications Team, as part of the DM&C Group, merging public policy communications and general communications staff into a unified team to serve all communications and media relations needs of the organization. DM&C Group recruited two seasoned communications and media relations professionals with Hill experience for the team.
- The process of building, expanding and sustaining The Arc network involves extensive interaction with leaders both within and outside The Arc network. During 2011, I participated in 9 individual meetings with leaders of other disability organizations, 3 meetings with high ranking government officials, and made 10 visits, speeches and other presentations to state and local chapters of The Arc. A listing of these meetings and events is attached as an Appendix A to this report. In addition:
 - CO&A Group conducted chapter visits in 7 states.
 - PubPol Group gave presentations in person or via audio/web conferencing in Pennsylvania, Kentucky, Illinois (phone), Virginia, New York, Florida, and Indiana, as well as with ANCOR, the Genetic Alliance, and the MetLife Center for Special Needs Planning.
 - PubPol Group represented The Arc in and with the following groups and coalitions: Consortium for Citizens with Disabilities, Advance CLASS, the Coalition on Human Needs, the Long Term Quality Alliance, the American Bar Association Commission on Law and Aging, the Social Security Advocates Group, the Strengthen Social Security Campaign, the SSI Children’s Program Coalition, the Coalition for Housing and Community Development Funding, the Department of Housing and Urban Development Disability Task Force, the National Fair Housing Advocates’ Group, the NISH NNA Public Policy Group, the Work Opportunity Tax Credit Coalition, the Friday Morning Collaborative, the National Guardianship Network, the Habilitation Coalition, the ITEM Coalition, the Coalition to Preserve Rehabilitation, the Coalition for Sensible Safeguards, and the Campaign for Better Care.

- Research & Innovations Group (R&I Group) represented The Arc at meetings, conferences and events, including: American Society on Aging, AAIDD (panel speaker), ANCOR (panel speaker), Autism Society, HCII Technology Conference (panel speaker), AUCD, Coleman Institute and NACDD (panel speaker).
- In 2011, The Arc's National Convention was attended by 550 people from 42 states, including 200 first-time attendees and 50 self-advocates. Gross surplus was \$64k, up from \$48k in 2010.

Strategy 1: Build the capacity of all chapters of The Arc to engage in both public policy advocacy and individual advocacy for people with I/DD

- DCOL Advocacy – chapter toolkits provided to support advocacy by chapters.
- The PubPol Group continued to conduct semi-monthly briefings for chapter leaders via telephone conference call and to regularly disseminated public policy information via 52 issues of Capitol Insider.
- DM&C Group, Operations Group and Public Policy Group worked collaboratively to produce Disability Policy Seminar, taking over more responsibilities from other seminar partners. Achieved 10% growth in attendance; 650 people attended, including 275 first time attendees and 50 self-advocates. Gross surplus divisible among the six co-sponsors was \$62,600, up from \$20,600 in 2010.
- The CO&A Group continues to convene state chapter advocacy staff for periodic telephone conference calls, regular email communications and a face-to-face meeting at the National Convention.

Strategy 2: Assure and sustain a state office or chapter in every state or a combination of state and regional offices that provide a presence in all 50 states.

- CO&A Group worked collaboratively with The Arc of Illinois to implement the terms of the mediation agreement relating to recruitment and retention of local chapters in Illinois.
- Provided input and advice to CO&A Group on state and local chapter recruitment and retention activities.
- CO&A Group cultivated relationship with Developmental Disabilities Council in Nevada and obtained grant to support The Arc Nevada initiative.
- CO&A Group supported local chapter in Idaho to transition to begin the state chapter.

Strategy 3: Dramatically expand the number of members and activists, including obtaining greater participation of families of younger children and people from diverse ethnic and cultural backgrounds

- Facilitated Committee on the Future to develop bylaws and affiliation agreement provisions relating to the future of membership in The Arc, as well as facilitating input gathering meetings and telephone conference calls with state executives, state presidents, NCE leadership and chapter volunteer and staff leaders.

Strategy 4: Promote and support the development of people with I/DD as leaders, advocates and spokespersons on issues of their concern.

- See results listed under Goal 2, Strategy 10, above.

Strategy 5: Actively collaborate with and support self-advocacy organizations and involve them in all aspects of the work of The Arc.

- See results listed under Goal 2, Strategy 10, above.

Strategy 6: Develop a network of well-trained, empowered and informed self-advocates.

- See results listed under Goal 2, Strategy 10, above.

Strategy 7: Build the capacity of board and staff leaders of state and local chapters, as well as individual members and volunteers, to engage in advocacy.

- See results listed under Strategy 1 in this section, above.

Strategy 8: Collaborate with culturally focused groups to increase awareness of The Arc in communities of color, as well as the accessibility of advocacy, supports and services for people with I/DD.

Strategy 9: Develop benchmarks and compile state-specific rankings of the accessibility and quality of supports and services for people with I/DD and their families.

Strategy 10: Empower people with I/DD and their families to tell their stories

- DM&C Group and Public Policy Group brought four families to the White House to tell their stories about the importance of Medicaid to the lives of their family members with IDD. Media relations included video of visits, press release distribution to more than 400 local media contacts and extensive social media dissemination.

Strategy 11: Position The Arc as the leading resource for the media and the general public about intellectual and developmental disabilities.

- Provided interviews with radio, TV, cable and print journalists, generating coverage including: MSNBC, www.disabilitycoop.com FINDS Survey Project.
- Autism Now! Project, including Autism Now! toolkit
- DM&C Group produced FINDS Chapter Toolkit, Disability Awareness Month Chapter Toolkit, DCOL Toolkit.
- ChEx Group republished all existing Fact Sheets with new branding, revising and updating as needed.
- Op Group responded to approximately 1000 inquiries via info@thearc.org. ChEx Group responded to 750-1000 inquiries received via telephone of thru other staff.
- See additional DM&C Group results under Goal IV, Strategy 3.

Goal VII: The Arc is a catalyst advancing best practices among all community-based service providers and the preeminent provider of inclusive services and supports for people with I/DD and their families.

Strategy 1: Establish a knowledgebase of best practices in supports and services for people with I/DD, as well as of the specific programs, services and supports offered by chapters of The Arc.

- Worked extensively with CO&A Group to analyze results of Chapter Profile Census Survey, providing extensive data about people served and programs services and supports offered by chapters of The Arc. (Survey launched 1/2011).

Strategy 2: Conduct or commission research to assess the quality of outcomes attained by people with I/DD served by chapters of The Arc in comparison to other community-based service providers.

Strategy 3: Set clear direct service standards for what are best practices in services and supports for people with IDD and their families and a system of education, training and support to promote organizational improvement consistent with the standards.

Strategy 4: Provide ongoing professional development and education for program staff of chapters of The Arc, promoting best practices in programs, services and supports for people with I/DD.

- Provided advice and counsel to ChEx Group in development of program for NCE Summer Leadership, Pre-Conference and National Convention, and new webinar program offerings.

Strategy 5: Develop and implement mechanisms for promoting continuous quality improvement in the supports and services provided by chapters of the Arc.

Strategy 6: Develop and implement processes to effectively address complaints from the public about programs, supports and services provided by chapters of The Arc, or other evidence of conduct that is incompatible with the best interest of people with I/DD and their families.

- Participated with CO&A Group in reviewing results of investigation of 25 complaints about chapters received in 2011 (compared to 23 in 2010). No disaffiliations resulted from complaints.

Goal VIII: The Arc is a household name, well known and respected as an effective, responsive, well managed and responsibly governed, and sustainable nonprofit federation.

Strategy 1: Rebrand The Arc to establish its position as the leading advocacy and service nonprofit for people with I/DD in the United States, including supporting chapters in implementing the new brand identity.

- Worked closely with DM&C Group to implement launch new brand. As of 12/31/11, 319 or 45% of chapters have signed on to use the new brand identity, including 35 of 41 state chapters and at least one chapter in 43 of the 49 states and territories where The Arc has a presence.
- See Goal IV, Strategy 3: Public Service announcements, Time Magazine special section, Achieve with Us! Social media contest.
- Trademark enforcement activities, including managing and participating in:
 - cross check of disaffiliated chapters for ongoing infringements;
 - logo analysis of infringing organizations;
 - consultation with DLA Piper about status and future course of trademark enforcement program.
- Worked with DLA Piper to:
 - Provide additional information needed to support applications for trademark registrations for new brand identity
 - Develop Affiliated Chapter version of trademark licensing agreement
 - Review/respond to chapter requests for changes to trademark licensing agreement and/or for special situations.
- Worked with DLA Piper to address ongoing infringement by MARC, Inc. t/a “arc Thrift Stores” in Colorado; developed “Co-existence Agreement” to resolve problem.
- Worked with NYSARC to develop customized version of Chapter Trademark Licensing Agreement to provide multiple options for local chapters of NYSARC.

- Communicated directly with chapters to address unusual or unique situations relating to signing on chapters to participate in the new brand launch.
- Served as primary contact and provided information necessary to:
 - Maintain listing in Forbes list of 200 Top Charities
 - Maintain listing in Chronicle of Philanthropy top 400 charities
 - Maintain status as BBB Accredited Charity
 - Obtain recognition with www.myphilanthropedia.org as one of the most effective disability nonprofits
- Arranged for The Arc's participation as an early adopter in Charting Impact – a joint project of Independent Sector, Guidestar and the BBB Wise Giving Alliance. www.chartingimpact.org
- Arranged for The Arc's rating as a "Top Rated Charity" with the American Institute on Philanthropy. www.charitywatch.org
- Chief Development & Marketing Officer delivered a break out session at The Arc of Maryland's annual meeting about rebranding.

Strategy 2: Reaffirm The Arc's relevance and role on behalf of all people with intellectual and developmental disabilities, regardless of diagnoses, at all stages of life.

- The branding initiative, described immediately above, supports this strategy.
- Autism Now! Project
- DM&C Group, NI Group and ChOrg Group developed exhibits and exhibited at the following conferences: US Business Leadership Network, Alliance for Full Participation, Autism Society of America, and National Conference of State Legislatures.
- See results under Goal IV, Strategy 3.

Strategy 3: Develop a collaborative approach to fundraising, among national state and local, that maximizes philanthropic resources

- Provided advice, counsel and support to DM&C Group in re-design and implementation of pilot collaborative fundraising program, including reviewing and editing appeal materials.
- Provided advice, counsel and support to DM&C Group in design and implementation of pilot donor acquisition mailings, including reviewing and editing appeal materials.
- Obtained \$400,000 in support from May & Stanley Smith Charitable Trust to support regrants to chapters for school to community transition project.
- NI Group distributed \$620,000 to chapters participating in School to Community Transition Program; \$85,000 to The Arc New Mexico under The Arc Down Syndrome New Mexico grant program.
- DM&C Group attained 18% increase in number of chapters participation in The Arc vehicle donation program, from 122 to 145 chapters, generating \$196,960 in donations.
- R&I Group developed and implemented cultivation initiative with outreach to approximately 280 national, regional and local foundations.
- DM&C Group developed event in a box – The Arc & Sprout Disability Film Festival.

Strategy 4: Strengthen and expand the depth and breadth of the network of local chapters, including: (i) Directly recruiting new local chapters in states where there is no state chapter, (ii) Support and coordinate with state chapters to recruit new local chapters, and (iii) promoting mergers and consolidation where necessary and appropriate to advance the mission of The Arc.

- Obtained commitment from NYSARC to increase affiliate dues investment by \$44,000 in 2011.
- Successfully resolved affiliation issues with The Arc of South Florida.

- Worked closely with The Arc of Illinois, including multiple visits and meetings, seeking reaffiliation of former chapters and affiliation of new chapters.
- Troubleshooting chapter issues, including (a) extensive communications with, and technical assistance provided to, Board of Directors and legal counsel of The Arc of the Pikes Peak Region, CO regarding governance and public relations issues and (b) information gathering, including site visit, regarding The Arc Jacksonville's proposed planned community.
- Facilitated Committee on the Future meetings to develop new bylaws and affiliation agreement.
- Provided input and advice to CO&A Group on strategy for recruiting and retaining local chapters.
- 18 chapters affiliated or re-affiliated, for a gain of \$26,800 in new annual affiliation fees; 8 of those have asked for or completed licensing agreement to implement new brand.
- 12 chapters were disaffiliated, merged with other chapters, or dissolved, for a loss of \$51,300 in annual affiliation fees. \$67,967 was written-off in bad debt.

Strategy 5: Establish a nimble, seamless, state of the art model for involving parents, family members and interested individuals as members of The Arc that is educational, mission driven, flexible, rewarding and high impact.

- See above under Strategy 4, Committee on the Future.

Strategy 6: Recruit and involve businesses, professionals, consultants, government agencies, associated nonprofits and other organizations in The Arc.

- Supported development and launch by DM&C Group of new corporate supporter membership categories on new website.

Strategy 7: Develop dynamic partnerships with major corporations to promote inclusion, as well as to provide ongoing support for The Arc at all levels.

- Cultivation of relationship with Sustainability Program Officer of Walmart Foundation regarding potential new grant opportunity.
- Attended US Business Leadership Network and Independent Sector Conference and met representatives of XX major national corporations; began follow-up cultivation of relationships with those companies.
- CRIO and/or CDMO cultivating relationships with corporations, including: Walgreens, McDonald's, Rest Assured.

Strategy 8: Provide ongoing professional development and education for executive and program staff of chapters of The Arc, promoting best practices in programs, services and supports for people with I/DD.

- Attend and participate in NCE Board Retreat and board meetings.
- Provided input and advice to ChEx Group on program for pre-conference and main program at Convention, and webinar series. ChEx Group presented:
 - 11 individual webinars and a 4-part Pass for Excellence series during 2011 for a total of 180 attendees;
 - NCE Summer Leadership Institute attended by 82, including 40 participants attending a one-day preconference;
 - National Convention, including 32 concurrent sessions.
- DM&C Group produced Convention Marketing Toolkit.

Strategy 9: Develop the Board of Directors to be composed of a majority of parents, family members and people with disabilities themselves on the Board, while also including leaders from the business, philanthropic, media, academic and others capable of providing resources and expertise necessary for the success of The Arc at the national level.

- Actively staffing and participating in: Board of Directors, Executive Committee, Committee on the Future, Board Development and Budget Finance & Audit Committee. Support staff and participate in other committees as needed.
- Facilitated beginning of board development process for 2012 for members of the Board Development Committee, including creation of new Board Prospectus.
- Worked extensively with new Board President in implementation of new Board Orientation program and in restructuring Board Committee structure.

Strategy 10: Increase use of technology, including social networking, in all aspects of the organization's work.

Additional Cross-Cutting Accomplishments:

- Worked closely with COO to plan for and implement new office selection, lease negotiations, office design and furnishing and relocation. Capital project came in at \$958,048 which was \$54,482 (5.3%) below board approved budget of \$1,012,530 and \$105,610 (10%) below architect's recommended budget of \$1,063,658.
Secured *pro bono* assistance from DLA Piper to support lease negotiations and transaction. Worked extensively with Senior Management Team and Finance Department Staff to develop proposed budget for FY 2012. Facilitated review and approval of budget by Budget, Finance & Audit Committee and full Board of Directors.
- Oversight of FY 2010 audit preparations and tax forms preparation for all three corporations. Audit completed in April 2011.
- Facilitated and supported the Board of Directors and the following committees: Board Development Committee, Budget Finance & Audit Committee, Committee on the Future of The Arc. Also participated with relevant staff in support of other committees as needed. Supported planning and implementation of the annual Business Meeting.
- Author articles for *Fusion (bi-weekly)*.