

SECURE

SPRING 2021 | ISSUE 15

A Strong Foundation: Critical to Families and the Future of The Arc's Work

“The Arc? What’s that?’ It amazes me now that I was asking those questions just a few years ago,” reflects Carol Wheeler as she thinks about the changes in her life since she first met Peter Berns, The Arc’s CEO. The two met while serving on the Obama Administration’s President’s Committee for People with Intellectual Disabilities. Carol and her husband Tom are parents to 33-year-old Max, who has Williams syndrome, a type of intellectual/developmental disability (IDD).

was only when Carol became connected with the President’s Committee – and The Arc – that the Wheelers took a deep dive into disability advocacy.

“I learned quickly that so many families face challenges much greater than ours.”

Having adopted Max as a baby, Carol and Tom traveled through the full journey typical of millions of families that include someone with IDD. The Arc supports these individuals and their families across the lifespan, helping them navigate the highs and lows that can begin with early medical challenges and special education programs and that carry on through the decades as their adult children look for jobs, supportive housing, and meaningful social connections.

government policy, it’s the organization best positioned to make a real impact,” she says.

Carol has supported this critical work through her service on the national board of The Arc and currently, through her position with the board of her local chapter, The Arc of DC. She recently agreed to lead the reactivation of The Foundation of The Arc of the United States because she feels the urgency of finding additional resources to fuel the work that still needs to be done. “The Arc has a long history of significant legislative and policy achievement, but we need more resources to reach a larger audience if we’re going to be as effective as we need to be.”



Left to right: Michael, Max, Tom, and Carol

Max’s family has been all in from the beginning when it comes to making sure Max has the supports and opportunities he needs and deserves. But it

“With 600+ chapters and a staff in Washington known for its expertise and track record of success in shaping

Story
Cont. on
page 3



Making Gifts to a Supporting Organization

BY MATTHEW METSCH, JD

Many donors are aware of the difference between Public Charities (supported mainly by the broader public) and Private Foundations (usually funded by one family). Less well known are a third type of charitable organization: Supporting Organizations. These are charitable organizations established to help provide ongoing funding and support to a specific public charity. By way of example, The Arc of the United States (“The Arc”), has a supporting organization, The Arc of the United States Foundation (“The Foundation”). The Foundation’s sole purpose is to support The Arc as a whole and many of its specific charitable activities.



Supporting organizations must meet certain standards set by Congress and the IRS in order to qualify as a supporting organization. These standards are in place to ensure that the supported organization is effectively supervising or paying particular attention to the operations of the supporting organization. In the case of The Foundation, it is deemed a Type I supporting organization, meaning that it is operated, supervised, or controlled by the supported organization, The Arc.

The relationship between a supported organization and a supporting organization provides critical, ongoing funding for

the supported organization’s programs. Programmatic activities of the supported organization are positively impacted by the supporting organization, as the latter designates, often permanently, the programs it will support.

“Securities remain deductible for up to 30% of a taxpayer’s AGI”

Supporting Organizations are separate legal entities from the supported organizations, and therefore have a separate board of directors from that of the supported organization. The Supporting Organization’s board can therefore set its own spending priorities, and through them help influence the direction of the supported organization.

From a tax perspective, gifts to supporting organizations are deductible to the same extent as gifts made to public charities. The CARES Act has increased the amount deductible to 100% of Adjusted Gross Income (“AGI”) for cash contributions,

which will remain in effect for 2021. Gifts of appreciated securities remain deductible for up to 30% of a taxpayer’s AGI.

Want to know more about supporting The Arc of the United States Foundation? Please contact **Tamala Scott, The Arc’s Senior Director of Development** at Scott@TheArc.org or 202.600.3487. Potential donors are encouraged to consult with their tax or financial advisor.

Matthew Metsch (mmetsch@brownadvisory.com) is a Strategic Advisor at Brown Advisory, providing guidance and support to individuals and families on estate planning, tax and philanthropic planning, and other investment and financial matters.

The Arc’s Grassroots Advocacy Power: THE KEY TO OUR PROGRESS

The Arc has made great strides since its start in 1950. The collective work of our grassroots has helped close institutions, expand community opportunities, and more. Now, amidst the devastation of COVID-19, we have an opportunity to eliminate the obstacles to inclusion and equity that remain, once and for all.

In just the last year, grassroots advocates from The Arc across the country have unrelentingly advocated for pandemic relief legislation to include people with disabilities and their families—including over 170,000 contacts to their Members of Congress through calls, emails, and tweets. And it paid off—the recently passed American Rescue Plan FINALLY addressed dire needs like funding to strengthen and expand access to Medicaid home and community-based services, stimulus payments for all adults with disabilities, food assistance, tax credits to cover health care and extended leave from work, and more.

The most recent relief legislation is a huge win, but we can’t let up now. There’s an exciting opportunity on the horizon: **the full realization of The Arc’s vision for the future through the Home and Community-Based Services Access Act (HAA)**. The bill would end waiting lists, make disability services available to everyone who needs them to live at home in their communities with their friends and family instead of institutions and nursing homes, and services would be portable from state-to-state. Learn more about home and community-based services at TheArc.org/MedicaidCantWait.



The future calls. We’re ready to build it better for people with IDD and their families. Are you ready to join us? Visit TheArc.org/action for the latest ways you can act.

A Strong Foundation — Carol Wheeler *Continued from Cover*

The Foundation is working to assemble a Board of Directors full of diverse, talented, and energized people — all committed to realizing a world in which people with IDD are valued members of their communities, with the opportunity to realize their full potential and a future that is secure.

We are obviously all slowly adjusting to the curve ball that COVID-19 threw at us, but the needs of The Arc and people with IDD can’t wait. Tom and Carol have made a commitment to The Arc as part of their future planning and although Carol hasn’t always been comfortable with the role of fundraiser, the past year has made her realize the absolute necessity of finding more support for The Arc and its mission. Carol has realized that through her new leadership role with the Foundation, she can help bring the essentialness of this work to the forefront for years to come. To learn more about the Foundation, email development@thearc.org.

SECURE

INVESTING IN THE FUTURE

Investing in the Future
Spring 2021 | ISSUE 15

KENNETH OAKES
President

GRACE L. FRANCIS
Vice President

LAURA KENNEDY
Treasurer

HUGH M. EVANS, III
Secretary

FREDERICK MISILO, JR.
Immediate Past President

PETER V. BERNIS
Chief Executive Officer

Editor
TRUDY JACOBSON

Copy Editing
PAM KATZ

Graphic Design
SASHA ZINOVIK

Publisher
TAMALA SCOTT



For people with intellectual and developmental disabilities

1825 K Street, NW, Suite 1200
Washington, D.C. 20006
800.433.5255

TheArc.org



1825 K Street, NW, Suite 1200
Washington, D.C. 20006

TheArc.org

SPRING 2021, ISSUE 15

NONPROFIT
U.S. POSTAGE
PAID
PRE-SORT

GIVING A GIFT OF STOCK IS EASY

TOP THREE REASONS TO GIVE A GIFT OF STOCK TODAY!

-  **1** You can give more
-  **2** You can donate stocks without headache
-  **3** You can potentially reduce future capital gains

For more information, please contact **Feng Zhang** at Zhang@TheArc.org or call 202.534.3705.



bbb.org/charity

The BBB Wise Giving Alliance National Charity Seal carries a lot of meaning for both donors and charities. After undergoing a rigorous evaluation by the BBB Wise Giving Alliance, The Arc is proud to have received their seal for meeting the Standards for Charity Accountability!



Achieve with us.[®]

The information provided in this publication is for informational purposes only and should not be construed as legal or financial advice on any matter.