



COMMITMENT. PASSION. RESILIENCE.

THE ROOTS OF OAK HILL.



2021 OAK HILL COMMUNITY IMPACT REPORT



## A MESSAGE FROM OUR CHAIR AND PRESIDENT



Dear Oak Hill Community,

The key to longevity is having strong roots, continually feeding and nurturing them. These roots emerge with purpose. To ensure us that we can and will survive the biggest storms that pass through. Every tree starts out small – tiny, even. An acorn must have the precise conditions to take root and grow into the mighty oak tree.

For 128 years, Oak Hill's mission has been deeply rooted throughout Connecticut communities. Since our inception in 1893, Oak Hill has remained planted with intent and promise. Never losing sight of the expectation and dreams set forth by founder, Emily Wells Foster, to provide the highest quality services to people with varying disabilities.

This continued assurance of growth is possible because of your support. Each one of you is an extension [the branches if you will] of the tree of life that is Oak Hill. You all breathe life into our programs and carry out our mission, serving those in need.

Since our humble beginnings as a small nursery school for blind children, Oak Hill programs have expanded into a comprehensive continuum of care that fills the gaps and meets the needs of people in our communities. Over the years we have developed our scope of services, constructed our programs, and created a working culture driven by compassion, confidence, and safety. One thing has never changed: our unwavering dedication to become and remain the leading agency offering disability services to children and families throughout Connecticut.

We are proud to be a leader in our community, but we are far from finished.

From our deep roots to our sprouting branches. Thank you for providing the necessary nutrients for our rich history and fruitful future. You empower us to grow a richer harvest and inspire our mighty oak tree to evolve, flourish, and blossom.

With Endless Gratitude,



A handwritten signature in black ink that reads "David Hadden".

David Hadden, Oak Hill Board Chair

A handwritten signature in black ink that reads "Barry Simon".

Barry Simon, Oak Hill President & CEO

# FINANCIALS

## Financial Highlights

July 1, 2020 – June 30, 2021

The financial results presented below have been excerpted from Oak Hill's consolidated financial statements for the fiscal year, which ended June 30, 2021. Contributions from generous donors and prudent investing of donations continues to subsidize the services we provide. Without the generous support of current and prior donors, the individuals Oak Hill provides services to would be unable to benefit from the innovative programs that are the hallmark of Oak Hill. Audited financial statements are available to interested parties through the business office at Oak Hill.

### Report of the Oak Hill Foundation

Matthew Zewinski, Chairman

- The Oak Hill Foundation had one of its best years on record, growing by \$28.5 million over fiscal year '21 and providing \$4,852,000 to Oak Hill in support of our mission. The portfolio returned just over 29% net of fees, and ended the fiscal year at \$140.8 million. The outstanding performance was largely attributable to the strong recovery in the capital markets, especially equities, as we emerged from the economic throes of the pandemic.
- Over time, the Foundation has been wise stewards of the capital that donors have entrusted to it, returning 8.8% per year after fees for the last 10 years, more than doubling the assets before distributions.

## Revenues

Group Home Services	\$54,659,344
Adult Day Programs	\$5,851,625
Oak Hill School	\$15,090,511
Behavioral Health Services	\$14,175,240
Easterseals Camp	\$25,563
Oak Hill Centers	\$876,279
General Program and Other	\$599,267

<b>Total Revenues</b>	<b>\$91,277,829</b>
-----------------------	---------------------

## Expenses

Group Home Services	\$54,139,668
Adult Day Programs	\$4,319,902
Oak Hill School	\$10,604,151
Behavioral Health Services	\$12,782,828
Easterseals Camp	\$944,984
Oak Hill Centers	\$1,436,713
General Program and Other	\$13,069,732

<b>Total Expenses</b>	<b>\$97,297,978</b>
-----------------------	---------------------

<b>Operating Deficit</b>	<b>\$(6,020,149)</b>
--------------------------	----------------------

## Contribution & Investment Income

Investment Income, Net*	\$2,881,843
Net realized and unrealized gains on investments	\$32,133,450
Income from Beneficiary External Trusts	\$2,449,481
Fundraising	\$2,550,406
Interest Rate Swap	\$19,425
Increase in value of beneficial interest in perpetual trusts	\$12,135,497
Gain on extinguishment of debt (PPP Loan)	\$1,312,802

<b>Total Fundraising and Investment Income</b>	<b>\$53,482,904</b>
--	---------------------

<b>Surplus after Fundraising &amp; Investment Income</b>	<b>\$47,462,755</b>
--	---------------------

\* Excludes realized and unrealized capital gains and losses on investments, which the Board of Directors of Oak Hill has directed be added to the investment pool. See "Report of the Oak Hill Foundation Investment Committee" for information on growth and management of the investment pool.



# DIGGING DEEPER

THE MORE ADVERSITY A TREE WITHSTANDS,

THE DEEPER THE ROOTS REACH

AND THE STRONGER THE TREE GROWS.

DIG DEEP.

## NEW ENGLAND ASSISTIVE TECHNOLOGY (NEAT) CENTER

Aided community members representative of education & individuals with disabilities with over **299** Lending Library Loans.

Supported over **710** people through Assistive Technology (AT) and Augmentative Alternative Communication (AAC) Evaluations consultations.

An astonishing **415** pieces of adaptive durable medical equipment (DME) were refurbished back to pristine condition, saving our customers over **\$169,003**.

**1,494** people were enriched by specialty trainings and professional development opportunities. Specific needs identified were: Communication, Learning/Developmental, Access, Vision, Daily Living, Recreation, Environmental Adaptations.

## CAMPS AND RECREATION

over **2,159** individuals engaged in enrichment activities at Easterseals Camp Hemlocks.



## COMMUNITY PROGRAMS

**746** front-line staff in Community Programs worked over **27,419** hours per week to protect and support the residents at Oak Hill.

## OAK HILL SCHOOL

**100%** of students and their families received individualized attention from the Oak Hill School team; allowing the team to meet holistic needs.\*

\*Included: food deliveries, assistance in securing housing, technology support, home visits, medical assessments and advice, educational, medical, clinical, and others.

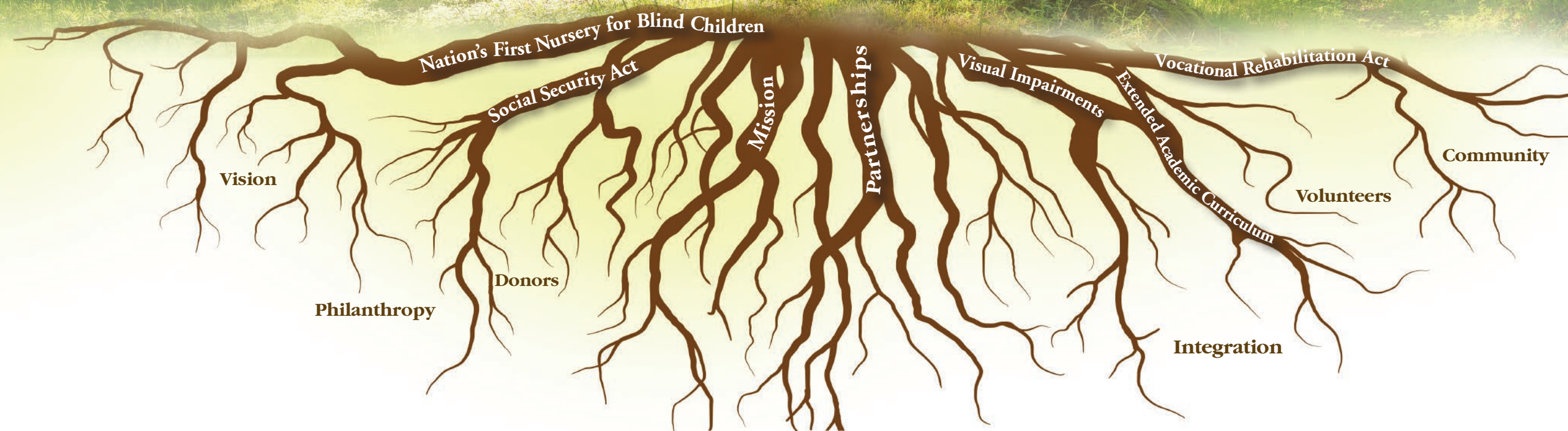
In keeping with Oak Hill's community support, this team also included vaccine clinics, organizing/providing testing for students & staff, and appointment transportation.

## ADVOCACY

Oak Hill Advocates responded to **20** advocacy campaigns on the State and Federal level, joining with our partners the CT Nonprofit Alliance, the American Network of Community Options and Resources (ANCOR) and Easterseals.

## CENTER FOR RELATIONSHIPS AND SEXUAL EDUCATION (CRSE)

**2,426** people were impacted and/or educated by the CRSE Positive Choices Curriculum, webinars, workbooks, and awareness campaigns.



**[ Emily Wells Foster ]**





## OUR MISSION

OAK HILL sets the standard, partnering with people with disabilities, to provide services and solutions promoting independence, education, health and dignity.

REACHING DEEPER, GROWING STRONGER.

THANK YOU FOR SUPPORTING OUR MISSION!



120 Holcomb Street  
Hartford, CT 06112-1589  
860.242.2274  
[OakHillCT.org](http://OakHillCT.org)