



NATIONAL FAMILY CAREGIVERS ASSOCIATION

20 Years: A Tradition of Caregiving

Fiscal 2012 Annual Report

JULY 2011 – JUNE 2012

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NFCA Board of Directors

As of June 30, 2012

OFFICERS

Jim Paglia, Chairperson
In's & Out's, Inc.
Chesterton, IN

Andrea Cohen, Secretary
HouseWorks
Boston, MA

Elizabeth Pearson, Treasurer
Pearson & Bernard PSC
Covington, KY

DIRECTORS

Eric Berger
Home Health Advocacy
Coalition

Hal Chapel
Lotsa Helping Hands
Sudbury, MA

Cheri Lattimer
CMI
Little Rock, AR

**Suzanne Mintz,
President and CEO**
National Family Caregivers
Association Kensington, MD

Jon Shanfield
IBERIABANK Corporation
Lafayette, LA

Ruben King-Shaw
Mansa Capital, LLC
Boston, MA

Dean Stephens
Healthline Networks, Inc.
San Francisco, CA

FULL-TIME STAFF

Suzanne Mintz, President and CEO

Lisa Winstel, Chief Operating Officer

Christal Willingham, Director of Finance and Program Administration

Mark Gibbons, Program Manager

Elizabeth Fernandez, Administrative Specialist

Vision, Mission, and Values

Vision

NFCA envisions an America in which family caregivers lead full and productive lives, free from depression, pain, isolation, and financial distress.

Mission

NFCA empowers family caregivers to act on behalf of themselves and their loved ones, and to remove barriers to health and well-being.

Values

- *Authenticity*
- *Community*
- *Empowerment*
- *Advocacy*

The Board realizes that the organization's longstanding values of Authenticity, Community, Empowerment, and Advocacy are about the character and work that NFCA does. Although these are extremely important, we remain committed to redefining our values in terms of the changing needs of the caregiver community. To that end, we continued to expand upon two new values that the Board adopted in FY 2011 to define all that we continue to work toward for all caregivers: Respect and Resourcefulness. These two words were central to all that NFCA did in 2012, and they continue to set the tone for our work.

Report on Programs

A Demographic Study of Caregiver Population

On October 27, 2012, NFCA released a Market Research report (funded with the support of Allsup, Inc.) on the size, demographic make-up, and major concerns of the nation's family caregiver population. This was not only useful as a general study of the family caregiver population, but will allow NFCA going forward to refine and better target its programs to the caregiver community.

Among the core issues identified by the family caregiver community in the study were the lack of respite care, meeting monthly financial obligations, and the caregiver's need to take care of their own personal health. The report also noted that the longer caregivers provide such care, the more intense their anxieties become.

VA Family Caregiver Program

In 2012, NFCA continued its work with the veterans caregiver community. In particular,

- 1) NFCA provided research, expert counsel and content for the Department of Veterans Affairs Caregiver website. (<http://www.caregiver.va.gov/>)
- 2) NFCA partnered with Easter Seals to develop a curriculum for the education of caregivers of veterans to help them understand the unique and complex needs of wounded veterans. NFCA subsequently participated with Easter Seals in a joint training program.
- 3) On August 30, 2012, NFCA presented at the Department of Veterans Affairs National Caregiver's Conference.

“Staying Healthy Together”

In partnership with XL Health, NFCA lead 40 in-person “Staying Healthy Together” conferences. The focus of these events was to emphasize the ways in which family caregivers can stay healthy while they work to care for their loved ones. Emphasis in these conferences was not only on the psychological and emotional wellbeing of caregivers and their care recipients, but also on such issues as effective communication with health care professionals, maintaining a patient file, emergency room visits and medication management, as well.

Defining the Alzheimer's Caregiver Community

NFCA remains committed to helping the caregiver community not only as a group, but to identifying the specific problems and peculiar needs of the communities within the larger community. With that in mind, NFCA partnered with Forest Laboratories, Inc. to sponsor a “Field Survey of Alzheimer’s Caregivers.” The survey, conducted by GfK Roper, interviewed 647 Alzheimer’s family caregivers around the nation across all income, gender, ethnic and age demographics. The results were released in a satellite media tour and were the basis of a Roundtable conversation where participants discussed ways to cope with the complex problems particularly associated with Alzheimer’s caregiving. Both the survey results and Roundtable feedback were used to develop an Alzheimer’s Caregiver Fact Sheet as well as a Tip Sheet for Alzheimer’s caregivers.

Spreading the Word

A core part of NFCA's mission is not only to advocate on behalf of the caregiver community, but to bring greater public awareness to the unique challenges family caregivers face. To fulfill that obligation, NFCA sponsored or participated in a wide array of programs to focus greater attention on caregiving, as well as to highlight some of the special stories that are part of the caregiving experience.

Among these:

- 1) NFCA conducted a field survey on behalf of the Food and Drug Administration to determine the extent and usage of medical equipment in the home by family caregivers and the challenges they face. The results were released at the Natural Human Factor Symposium.
- 2) In cooperation with the AARP, NFCA participated in a webinar on meeting the financial challenges of caregiving.
- 3) NFCA became a supporter of "The 7 Summits Climb for Alzheimer's: Memories are Everything" campaign. Sponsored by Janssen Alzheimer Immunotherapy and Pfizer, Inc., the "7 Summits" campaign is a fundraising effort by Alzheimer's disease advocate Alan Arnette to climb to the peak of the highest mountains on each of the 7 continents. All funds raised by the campaign go directly to advance Alzheimer's research.
- 4) Based on information provided by NFCA, TEDMED2012 selected the "Caregiver Crisis" as the second most important health and medical issue of the year.

National Family Caregivers Month

“The true strength of the American family finds its roots in an unwavering commitment to care for one another.”

*~ President Barak Obama
NFC Month Proclamation*

Since 1994, NFCA has been promoting November as National Caregivers Month, featuring a series of events, activities, programs and outreach efforts designed to highlight the issues, concerns and achievements of family caregivers throughout the nation. In 2011, NFCA continued that tradition and introduced a new National Caregivers Month webpage and “press kit,” bringing together in one place materials and helpful information on all the various events and activities related to this important month for family caregivers across the nation.

Included in the content of the “press kit” was:

- 1) The 2011 Proclamation by President Obama recognizing November as National Caregivers Month and paying tribute to the vital role played by America’s 65 million family caregivers.
- 2) A copy of the Allsup and NFCA survey of the profile and issues of concern to the nation’s family caregivers.
- 3) A message from Assistant Secretary of Aging, Kathy Greenlee
- 4) A sample proclamation to celebrate National Family Caregivers Month
- 5) An Exploration of the Activities and Concerns of Higher-burden Family Caregivers
- 6) An Alzheimer’s Disease Family Caregiver Tip Sheet
- 7) Press releases on National Family Caregivers Month and announcing the “National Family Caregiver of the Year” Award
- 8) Spanish language materials on NFC Month.

The theme for National Family Caregivers Month 2011 was “Identifying Family Caregivers”. Despite the huge role family caregivers play in the care of their loved ones, such caregivers remain virtually invisible in American health care. NFCA will continue to work to make such anonymity a thing of the past and will shine the spotlight on the essential place of the family caregiver in meeting the needs of the disabled, the sick and the elderly.

Planning for Transition and Succession

In the spring of 2011 the Board of Directors formed a Succession Plan Committee to develop a strategy for the succession from NFCA's co-founder, upon the retirement of longtime President and co-founder Suzanne Mintz, to a new CEO.

A critical part of this was an in-depth process to take a fresh look at the organization. The Board engaged in an intensive, extended effort to analyze the need for a new name and a new brand for NFCA.

Also, central to this strategy was an initiative to take a new look at the role of the CEO in light of the ever changing needs of the family caregiving community, as well as to lay out the timetable for finding and hiring a new CEO who would bring new energy and direction to NFCA consistent with those changing needs.

In September of 2011, NFCA adopted a succession plan based on the guiding principles of

- Assuring an orderly transition
- Engaging in open, authentic and transparent communication
- Continuing to serve existing members and funders while delivering on NFCA's mission and priorities

Pursuant to adoption of the succession plan, NFCA appointed a Search Committee which hired a search firm, developed a position description for the new Chief Executive Officer, and defined an outline of what success would look like for NFCA three years subsequent to the hiring of a new CEO. The aim of the Search Committee was to bring on a new CEO by June 2012.

Subsequently, after an exhaustive and comprehensive search, NFCA proudly announced on June 22, 2012 that Mr. John Schall had been named as the new CEO.

Mr. Schall is a public policy and communications professional with noted expertise in a wide range of policy fields, including health care, labor, education, economic development, taxation and budget policy. Most recently he had served as Deputy CEO of the Parkinson's Action Network, and before that had served in a variety of senior level positions both in and out of government. He holds a Master of Public Policy degree from Harvard University's John F. Kennedy School of Government, and is a graduate of the University of Michigan.

Mr. Schall assumed the CEO position on June 25, 2012.

Financials – FY 2012

Assets

Current Assets

Cash and Cash Equivalents	\$ 5,233
Accounts Receivable	114,638
Prepaid Expenses	<u>6,169</u>

Total Current Assets 126,040

Property and equipment 70,813

less accumulated depreciation (68,819)

Net Property and Equipment 1,994

Other Assets

Deposits 3,250

Total other Assets 3,250

Total Assets \$ 131,284

Liabilities and Net Assets

Current Liabilities

Line of Credit 75,000

Accounts Payable 45,730

Accrued Vacation 11,107

Deferred Revenue 1,805

Total Current Liabilities 133,642

Net Assets

Unrestricted (2,358)

Temporarily Restricted -

Total Net Assets (2,358)

Total Liabilities and Net Assets \$ 131,284

Corporate and Foundation Support

AGIS Network, Inc.

Allsup

Eisai, Inc.

Forest Laboratories, Inc.

Genentech

Genworth

Home Instead Senior Care

Invacare

Jazz Pharmaceuticals

Long Term Solutions

Merck & Co., Inc.

MetLife Foundation

Novartis

Pfizer, Inc.

Philips Healthcare

Principle Business Enterprises, Inc.

Purdue Pharma

Sanofi, Inc.

Teva Neuroscience, Inc.

Together Rx, LLC

UnitedHealthcare

WellPoint, Inc.

XL Health Corporation

Expenses



Revenues and Gains

