



annual report 2014-2015

PAF Patient Advocate
Foundation

Solving Insurance and Healthcare Access Issues | since 1996

*Helping Patients
One at a Time...*

MISSION STATEMENT

Patient Advocate Foundation was established in 1996 as a national 501(c)3 organization with a mission of “safeguarding patients through effective mediation assuring access to care, maintenance of employment and preservation of their financial stability.” PAF serves as an active liaison between patients and their insurer, employer and/or creditors to resolve insurance, job retention, and/or debt crisis matters relative to their diagnosis through case managers, doctors and health care attorneys.

Patient Advocate Foundation has been helping patients solve their insurance and health access problems through our Direct Patient Services Division for over 19 years. During its first year of operations, PAF assisted 157 patients in a 10x10 foot warehouse space. In FY 2014/2015, PAF assisted 86,516 patients in an over 37,000 square foot national headquarters located in Hampton, Virginia. Services are provided by our professional case management staff, the Co-Pay Relief (CPR) staff and the MedCareLine staff. Case management was and continues to be PAF's main core competency with Co-Pay Relief emerging as a second core competency in 2004.

Lee Q.
Florida
Multiple Myeloma

“Thank you for notifying me that I need to reapply for assistance from your organization. Any letter from your organization elicits feelings of unbridled relief and gratitude since your financial assistance is literally the difference between life and death for me. Despite my former doctor advising me that he could do nothing more for me, I have been fortunate enough to find a new doctor who has resumed my treatments and advised me that there is a new medication on the horizon that may specifically treat my type of cancer, multiple myeloma.

Apparently, the new medication is undergoing testing for approval within a few month of course, this is the “type of news” that all cancer patients hope for and I am no different, with the possible exception of “fighting cancer” for more than 10 years.

Despite having insurance and supplemental insurance, the costs for treatment seem always to accept the benefits that those two insurances provide and it is your foundation that makes possible my treatment.

I don’t know if I can expect remission, but certainly, that is my hope. Until that time, I must ask you for your continued financial assistance be it for a matter of months or a full year. As before, no one provides me with any information about the costs involved in my treatment, but since the treatments continue, it must be because your foundation “picks up” the difference between the charges and the insurance. It is a situation with which I am totally unfamiliar, but my gratitude is unbounded, where despite the pain, I wake up to spend another day with my wife, who has literally sacrificed her life to care for me and I am able to communicate with my son and share the lives of my two grandchildren. Perhaps, it is living such a tenuous existence that makes one appreciate the value of “one more day of life” instead of taking it for granted, as people who do not face life dealing with cancer, often do.

So, if it is possible for you to continue your financial support, I assure you that my appreciation is unbounded and I wish to thank you for your help to me and to others who are “caught up” in the tentacles of cancer, with no where to turn except to the kindness of strangers. May God bless you for your good work and kindness.”

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Greetings From



Alan J. Balch, PhD
Chief Executive Officer

PAF provides hope and help one patient at a time. We have now served roughly 785,000 patients with direct support since our inception in 1996. The 2013/2014 Annual Report reveals a collection of compelling data representing tangible influence on the American patient population. In this past year, our Patient Services Division directly impacted 86,516 patients and made over 1 million contacts with various stakeholders vital in resolving patients cases and issues. PAF has consistently dedicated itself to assisting underserved and financially challenged populations. In the past year, for instance, 61 percent of the patients PAF served earned less than \$23,000, and just over 78 percent had an income below \$35,000.

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In the past 12 months, the Patient Advocate Foundation's Co-Pay Relief allocated more than \$33 million in direct patient assistance to 25,330 qualified patients. The program has now mobilized more than \$232 million in medical and financial assistance, touching over 132,000 lives since 2004.

The report also highlights key programs and services, made possible by the generosity of our donors. Their support enables our passionate staff to find unique solutions to complex financial, logistical, and administrative problems faced by our patients. We demonstrate our appreciation for any donation, no matter how big or small, through our commitment to the fiscal stewardship of those gifts. Of every dollar raised, 94.6%, or almost 95 cents, goes to support a program that will directly impact a patient. PAF was once again awarded a 4-star rating from Charity Navigator, its highest rating, for the 6th consecutive year. Only 3% of the charities rated have received 6 consecutive 4-star ratings.

At PAF, we will continue to be driven by purpose and sustained by passion to bring practical support to patients who are struggling. Thanks for your past and future support as we continue to help those who need it most.

A handwritten signature in black ink that reads "Alan J. Balch". The signature is written in a cursive, flowing style.

Alan J. Balch, PhD
Chief Executive Officer

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Direct Patient Services Division



Solving Insurance and Healthcare Access Problems | since 1996

Since our inception on April 4, 1996, Patient Advocate Foundation (PAF) has provided services to 784,252 patients, assisting them with obtaining access to healthcare related issues. Patients contact PAF when they have been diagnosed with a chronic, life threatening and/or debilitating disease and are having issues with their insurer, their employer or are facing medical debt crisis issues.

Summary of Patient Cases and Contacts

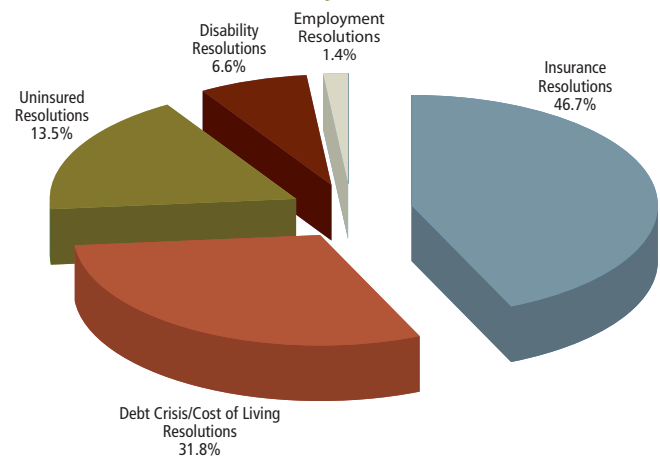
Case Count:	64,633
Total Email Contacts:	21,883
Total Patient Case Count:	86,516
Total Patient Services Division Case Contacts:	1,059,028

In FY 2014/2015, PAF assisted 86,516 patients, making 1,059,028 contacts on behalf of those patients to the various stakeholders necessary to resolve their case. On average, there were 13.48 contacts made on behalf of the patients assisted. Patients reached out to PAF with the following issues:

Insurance	43.4%
Debt Crisis/Cost of Living	26.8%
Uninsured	13.0%
Program Information Request	9.9%
Disability	5.7%
Employment Issues	1.3%

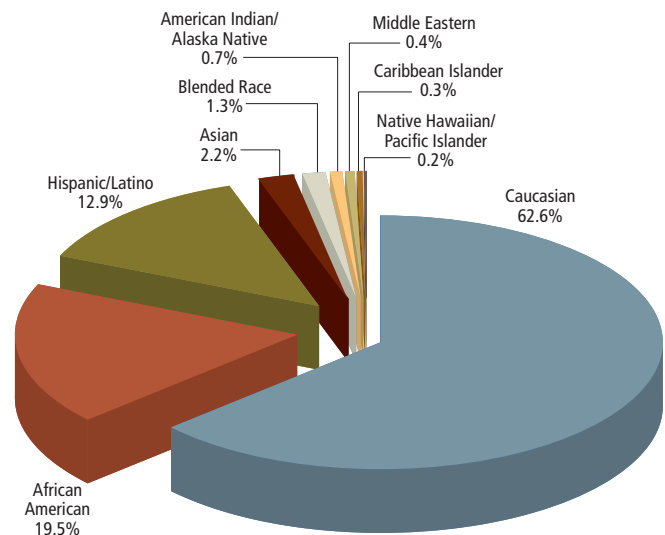
The resolutions obtained on those issues on behalf of patients are represented in the following chart:

Resolutions of PAF Case Management Patients in FY 14/15



Patient Advocate Foundation had a slight increase in the number of male patients served, moving from 36.7% in FY 2013/2014 to 38.3% in FY 2014/2015, meaning that 61.7% of the patients served were female. This change may be attributed to a Financial Aid Program which provided assistance solely to male patients who had been diagnosed with Prostate Cancer and who needed financial assistance. The ethnicity of the patients served did not change dramatically.

Ethnicity of PAF Case Management Patients in FY 14/15



PAF has been fairly consistent over the last several years in the ethnicity breakdown which truly is a reflection of the population of the United States. PAF has conducted outreach efforts through its National African American Outreach Program (NAAOP) and the National Hispanic/Latino Outreach Program (NHLOP). Case Managers assigned to both programs reached over 3,800 attendees at outreach events including:

- National Black Nurses Association Conference
- National Association of Hispanic Nurses Conference
- National Conference of La Raza 2014
- Rhema Harvest Church Community Health Fair
- Sister's Network Annual Conference
- Concerned Citizens for Community Excellence-Fall Health Fair
- Riverside Cancer Support Group
- Cancer Support Community-Cost of Care Workshop
- Foster Grandparents Day Off Fair

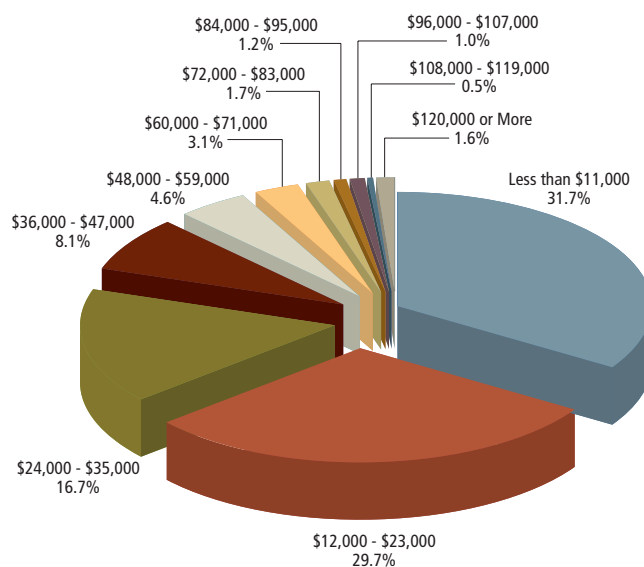
In FY 2014/2015 PAF launched a formal Health Equities Initiative as a result of its vested interest in ensuring that low and under-resourced African Americans, Hispanic/Latinos and other population groups are linked to the various support services that can help them through the healthcare continuum. PAF's strategic focus with these vulnerable populations is to establish a platform built upon our experience of serving disparate populations through the aforementioned NAAOP and NHLOP. Both programs are now part of the Health Equity Initiative.

The Health Equities Initiative expands the level that our existing programs reach and serve patients. It builds community capacity for linking underserved and under-resourced individuals to the services and resources available through PAF. It also involves a community outreach and engagement component which emphasizes community partnerships. These partnerships build bridges for patients by connecting them to local, regional and national resources. PAF's on-going sustained presence in a targeted community allows us to work with local partner groups and local community navigators who serve as distribution channels and referral sources.

The Initiative has a multi-tiered approach which includes:

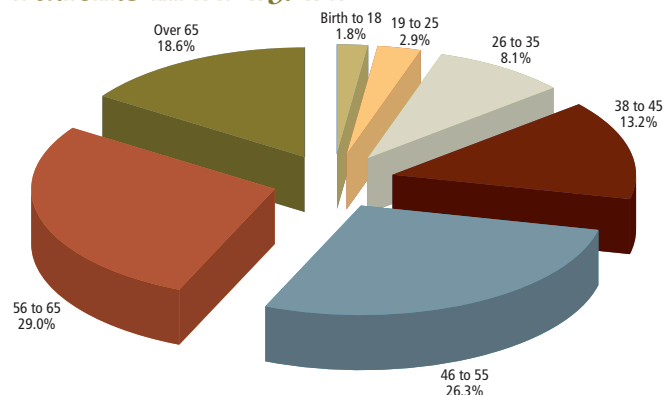
- Training for lay and clinical navigator groups on the vast number of local and national resources;
- Establishment of a closed referral system with various stakeholders to immediately link patient to PAF case management and co-pay support programs and services; and
- Establishment of a local financial aid fund to offset expenses related to diagnostic procedures, transportation and other logistical barriers to care for individuals with cancer.

Income of PAF Case Management Patients in FY 14/15



As the chart above illustrates, over 61% of the patients assisted by PAF have an annual household income of \$23,000 or less. Increase that income level to \$35,000 or less annually and over 78% of the patients served in FY 2014/2015 fall within that category.

Age Groups of PAF Case Management Patients in FY 13/14



Over 76% of the patients served by PAF were between the ages of 26 to 65 years old, an age group that is typically in the work force. This is further reinforced by the number of patients served who have some form of insurance coverage...only 19.9% of the patients served were uninsured. Other types of insurance coverage included:

Commercial Insurance.....	34.8%
Uninsured.....	19.9%
Medicare	13.8%
Medicaid	30.6%
Military Benefits	0.9%

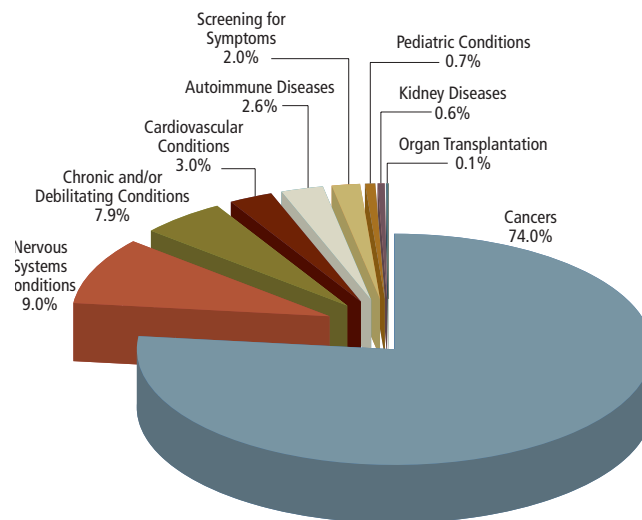
While PAF is not a disease specific organization, having assisted patients with over 340 different disease diagnoses, patients with cancer represented 74% of the patients served.

Of that, the top ten cancers were:

	% of the Whole	% of the Top 10
Breast Cancer	26.7%	37.3%
Colorectal Cancer	9.9%	13.8%
Lung Cancer	9.4%	13.1%
Prostate Cancer	9.0%	12.5%
Lymphoma (Non-Hodgkin's)	4.0%	5.5%
Leukemia	3.3%	4.6%
Ovarian Cancer	2.8%	3.9%
Brain Cancer	2.4%	3.3%
Cervical Cancer	2.2%	3.1%
Testicular Cancer	2.0%	2.8%

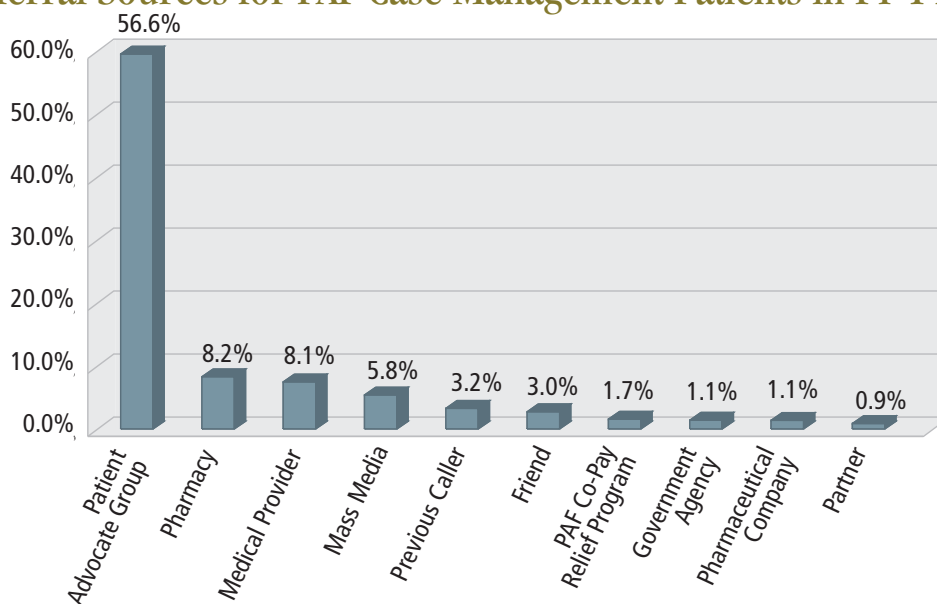
*PAF case management served 77 cancer diagnoses, the top ten cancer diagnoses represent 71.6% of all cancer diagnoses.

Health Conditions of PAF Case Management Patients in FY 14/15



Patient Advocate Foundation receives referrals from many different referral sources, some of which PAF has formal relationships with and some that are natural referral sources. The chart above represents 90.8% of all case management referral sources.

Top Ten Referral Sources for PAF Case Management Patients in FY 14/15

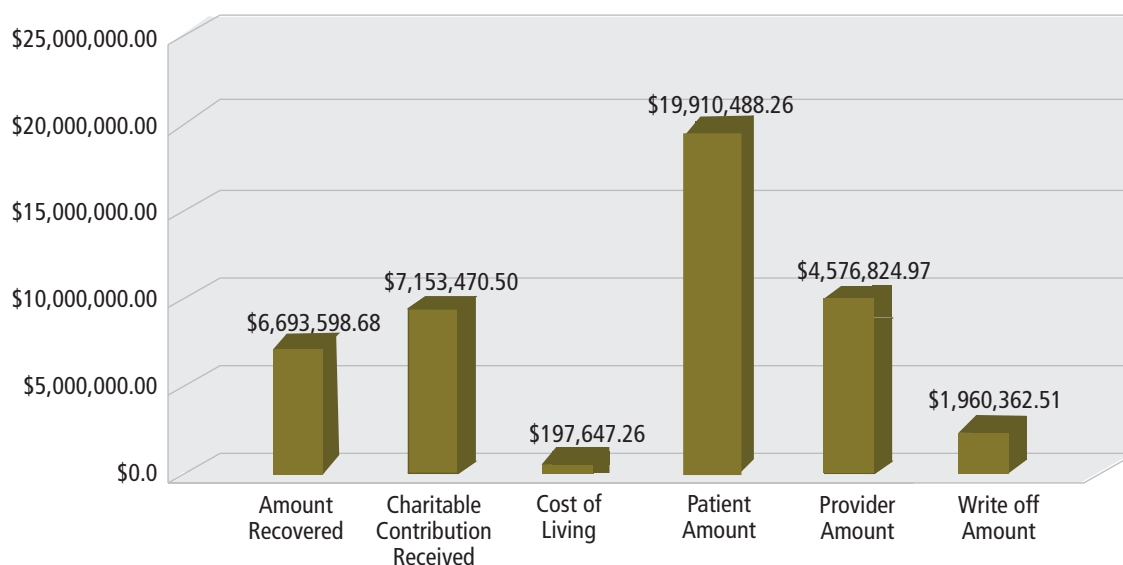


* Top 10 referral sources exhibit represents 90.8% of all case management referral

PAF case managers also track the total amount of debt relief obtained for patients as they are working the case. This is only financial relief that is reported

and/or recovered during the course of the case work; this does not include any long term or future financial benefits resulting from case resolutions.

Debt Relief Obtained for PAF Case Management Patients in FY 14/15



Total Debt Relief* Obtained in FY14/15: \$40,492,392.9

* Case managers can only document financial relief that is reported and/or recovered during the course of work for an open case. Any long term or future financial benefits resulting from resolutions are not captured.

Amount Recovered: the amount PAF recovered from third party payers such as commercial insurance plans and Medicaid and Medicare programs

Charitable Contributions: the amount PAF secured on behalf of patients through utilization of national and/or local charitable resources such as hospital charity care programs, non-profit financial aid programs and/or local faith or disease based programs

Cost of Living: the amount recovered by PAF case managers to directly offset living expenses such as: rent/mortgage assistance, eviction/foreclosure assistance, utility assistance, food/nutritional

assistance, or car payment/repair expenses among others

Patient Amount: the amount directly returned to patients as a result of PAF negotiating reimbursement for out-of-pocket medical expenses

Provider Amount: the amount directly returned to providers as a result of PAF negotiating reimbursement for medical debt that had previously been written off of logged by the facility as “uncollected”

Write Off Amount: the amount of patient debt relief obtained by PAF through negotiations with facilities and/or medical providers

Gloria R.
California
Breast Cancer

“To whoever reads my letter,

I want to thank you for all the help you have given me. It’s been five years since I started my battle against cancer and it is very difficult to fight cancer with any economic burdens.

There were times when we did not have any money to eat and I was able to apply for SSI in 2013 for 2104 but my husband made \$100 over the income requirements, the assistance ended.

Your fund is very helpful for patients that are in need. Thank you for your work. I feel blessed.

Once again thank you and God bless.”

National Partnerships

Patient Advocate Foundation continues to provide case management services to other national non-profit organizations. In FY 2014/2015, PAF completed its seventh year of partnership with the American Cancer Society (ACS). Patients are referred from the ACS call center and PAF works the case to resolution. In FY 2014/2015, PAF received a total of 8,048 ACS referrals, of which 1,582 were served by other PAF programs which could best need their issues, including a PAF MedCareLine Program.

PAF also continued its partnership with the LIVESTRONG Foundation, now in its 11th year. PAF was, and continues to be, one of the original SurvivorCare program partners and provides dedicated case managers to serve those referrals. PAF assisted 4,640 patients in FY 2014/2015. Through the PAF Austin, Texas-based case manager, who is housed at the LIVESTRONG Cancer Navigation Center, PAF was able to provide services to an additional 413 patients who live in the greater Austin area and who walk into the Center for assistance.

MEDCAREline

ACCESS TO EMERGING MEDICATION THERAPIES

The **MedCareLine** is a customizable and disease specific case management program. The MedCareLine was launched in 2006 with the **Colorectal CareLine (CCL)** which is still in operations. The staff on a CareLine team tends to be more clinical in nature and very knowledgeable in the reimbursement arena. The Colorectal CareLine assisted 866 patients in FY 2014/2015 and is sponsored by and in partnership with Genentech. The CareLine can also have a Financial Aid Fund (FAF) component to provide small, one-time grants for patient needs such as transportation. Financial Aid Funds can also be operated as a stand-alone program. Other CareLines and Financial Aid Funds include:

The **Aetna Clinical Appeals CareLine** which was launched in June of 2012 and provides Aetna

members the benefit of PAF case management services as a direct referral to PAF as a part of Aetna's appeals process. The staff on this CareLine use their knowledge of coverage issues, health care resources and clinical experience to independently find solutions to the members' challenges.

The **Narcolepsy CareLine** was launched in 2012 in partnership with sponsor Jazz Pharmaceuticals. This team of professional case managers provides services to patients who have been diagnosed with narcolepsy and their providers and caregivers. Patients are assisted with insurance appeals, guidance on insurance benefit reimbursement and benefit programs, assistance with enrolling into Medicare, Medicaid and screened and enrolled into disability programs if appropriate. The Narcolepsy CareLine assisted over 1,800 patients in FY 2014/2015.

The **Heart Valve CareLine**, sponsored by and in partnership with Edwards Lifesciences, launched in 2013 and is a national, toll-free patient and provider hotline designed to provide free healthcare information and case management services to patients who have been diagnosed with heart valve conditions. In 2014, a companion Financial Aid Fund (FAF) was sponsored by Edwards Lifesciences to assist patients with a small one-time grant to help them with the out-of-pocket expenses associated with heart valve health care.

Also in 2013, PAF launched the **FoundationOne CareLine**, sponsored by and in partnership with Foundation Medicine. The FoundationOne CareLine is staffed by a clinical team who provide case management services to patients who are seeking education, access and reimbursement for genomic testing in order for them, and their physician, to make informed decisions on choosing the most appropriate treatment options. The CareLine was rebranded as the FoundationAccess CareLine in FY 2014/2015 and assisted over 240 patients.

PAF launched one new CareLine in FY 2014/2015... the **Hepatitis C CareLine** in January 2015. This CareLine has a companion Co-Pay fund in PAF's CPR program which enables patients with a Hepatitis C diagnosis to access case management services and if necessary, co-pay assistance.

The CareLine served over 450 patients in FY 2014/2015.

PAF also launched a stand-alone Financial Aid Fund to assist patients diagnosed with metastatic Melanoma or metastatic Lung Cancer. One time grants in the amount of \$300 are provided to patients who meet certain financial criteria. Grants may be used to provide transportation assistance.

Patient Empowerment Series

The Patient Empowerment Series was launched on May of 2015 and arms patients and caregivers with comprehensive educational information and effective strategies to increase health care access. The Series features practical advice on the most frequently reported access barriers and/or educational concerns gained from PAF's years of delivering case management services to those Americans facing life threatening, chronic or debilitating diseases. The Patient Empowerment Series is comprised of four components:

- Live monthly webinars which become on-demand webcasts within 24 hours of original broadcast
- Access to interactive web-based resource tools
- Access to the comprehensive PAF resource library
- Weekly social media posts providing supplemental and in-depth advice on healthcare issues

CDC Grant

Patient Advocate Foundation was awarded a five year grant through the Centers for Disease Control and Prevention (CDC) in August of 2014. The "Project to Reduce Tobacco-Related Cancer Disparities in Underserved Populations" builds upon previous CDC grants/cooperative agreements that PAF has been awarded in the past. PAF calls the project "SelfMade Health."

The SelfMade Health Network envisions an America in which vulnerable populations throughout rural and urban regions have equal access to relevant and affordable resources, and routinely utilize evidence-based services leading to greater opportunities for more informed decisions about cancer-free and tobacco-free living.

Through the establishment of cross-cutting leadership, the mission of SelfMade Health Network is to create a collaborative network in which generations of populations "at risk" of having poor physical, psychological, and/or social health can connect with resources to effectively meet their needs related to cancer prevention and reduced risks associated with tobacco use.

SelfMade Health Network specifically focuses on reducing and eliminating tobacco-related and cancer health disparities in documented populations containing those with low socioeconomic status. Through the establishment of membership-based partnerships at national, state and regional levels, coupled with the promotion of new insights and innovative solutions, SelfMade Health Network strives to link vulnerable populations to essential information, resources and services to assure the provision of equitable preventive care and environmental support where otherwise unavailable.

SelfMade Health Network is one of the newest members of the CDC's consortium of national networks established to advance prevention efforts related to tobacco-related and cancer health disparities among vulnerable populations. SelfMade Health Network's funding comes from the Office on Smoking and Health (OSH) and Division of Cancer Prevention and Control (DCPC) within the CDC, distributed through the DP13-1314 National Networks to Reduce Cancer and Tobacco Related Disparities Cooperative Agreement.

Working alongside SelfMade Health Network as sibling networks, the following have also been awarded a cooperative agreement to address tobacco-related and cancer health disparities in their respective populations:

- Reaching Asian Americans Pacific Islanders through Innovative Strategies to Achieve Equity (RAISE)
- National African American Tobacco Prevention Network (NAATPN)
- Nuestras Voces (Our Voices)
- LGBT HealthLink
- Geographic Health Equity Alliance
- National Behavioral Health Network for Tobacco & Cancer Control

The PAF Co-Pay Relief Program offers financial support to patients suffering with chronic and critical diseases who are unable to afford their out-of-pocket responsibilities for their pharmaceutical co-payments, co-insurance and deductibles required by their insurance plan. CPR continued to grow in FY 2014/2015, launching Cervical Cancer, Ovarian Cancer and Hepatitis B silos, and expanding the following silos:

- Breast Cancer
- Chronic Pain
- Hepatitis C
- Multiple Myeloma
- Myelodysplastic Syndrome
- Osteoporosis
- Ovarian Cancer

CPR approved 25,330 patients into the program in FY 2014/2015, processing almost 53,840 expenditure claims and expending over \$33 million dollars directly to providers, pharmacies and patients. This figure does not include award amounts that are reserved in a patient's name for future expenditures.

Female patients comprised over 84% of the patients served with over 15% being male. The PAF Breast Cancer and the Osteoporosis funds are two of our most heavily utilized funds, both diseases which are primarily in the female population.

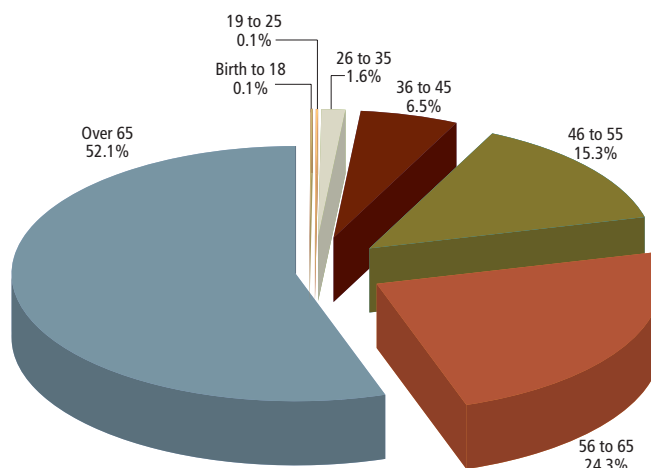
Patients in the program must be insured with a pharmaceutical benefit. The insurance breakdown for FY 2014/2015 was:

- Medicare 62.6%
- Commercial Insurance 36.4%
- Medicaid 0.5%
- Military Benefits 0.5%

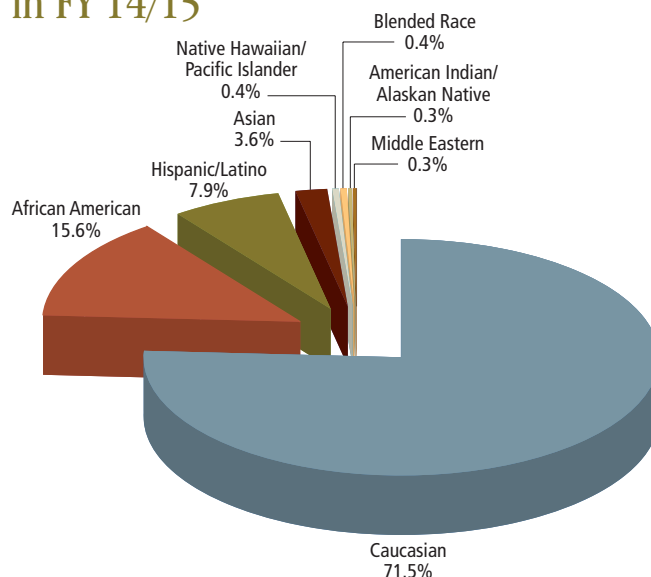
The ages of patients utilizing the Co-Pay Relief program tend to skew older, as indicated by the

chart below. This is a direct result of the majority of the patients served being Medicare beneficiaries.

Age Groups of PAF Co-Pay Relief Patients in FY 14/15



Ethnicity of PAF Co-Pay Relief Patients in FY 14/15



PAF has set five standards for the CPR Program that result in a high quality patient experience: They are:

- Patients Get and Stay on Therapy
- Customized to the Patient
- Right Amount of Assistance at the Right Time
- Access is Simple and Efficient
- “Best in Class” Compliant Program

PAF continues to wait on the HHS Office of Inspector General’s re-certification of PAF’s CPR program; however we are pleased to report that we will not have to make any changes to our operating model and we believe that our program will serve as a “Best In Class” model for the charities in our competitive space. This re-certification is a result of a “Special Advisory Bulletin” issued to all co-pay programs in the marketplace in May of 2014. The Bulletin provides guidance to all programs on operational practices that must now be adhered to.

The policies, procedures and practices PAF have always followed did not raise any concerns with the OIG as we have always operated within our opinion (#04-15) and never operated a program that violated the three areas of concern raised by the OIG’s.

PAF CPR continues to enhance our ability to serve more patients and constantly seeks to efficiently and effectively speed a patient’s access to prescribed therapy. To this end PAF’s CPR has launched a new Instant Eligibility determination and our new database enhancements will provide our team with a number of new enhancements for the patient, caregivers and providers. These enhancements to our program will help with 1) efficiencies, 2) speed and 3) communications.

Patient Advocate Foundation would like to thank all of the generous companies, donors and supporters of this program.

Robert G.
Oregon
Hepatitis B

“I am deeply grateful for the opportunity to evaluate your services, to thank you for the wonderful gift they provide to me and my family and to attempt to explain some of the reasons for my gratitude. On November 6, 1998, I received a liver transplant at Cedars Sinai Medical Center in Los Angeles. Since that date, not a single morning has passed without thinking of my donor’s family and the gift of new life. Through the thoughtful work of agencies such as yours, I have also become aware that the continuation of my health and survival depends on the work of many people who are dedicated to the well-being of others that they will never meet. And I am unable to thank folks like you in person. My only hope is to lead the best and most productive life I can. Let me add a few details to this statement. When I was a young man, I suffered bullet wounds to my internal organs. Through the grace of God, I survived after a long ordeal and a near-certainty that my life would be a short one. Over the following decades, I underwent many follow-up surgeries and more blood transfusions that I can recall. Not all of those transfusions were helpful. But here I am. Over the years, I was lucky to meet the woman of my life, raise a family, and to eventually hold my four grandchildren in my arms. On this day, I was blessed to hear them telephone birthday wishes to me and express their love. I could add much to this brief expression of gratitude but instead I just want to reaffirm my thanks to the long chain of workers who spend their time helping my growing family thrive.”

Media

Patient Advocate Foundation has always, and continues to be represented in many media outlets across the United States.

MEDIA OUTLETS

AlterNet
Amgen
AP (Hosted)
Bloomberg
Daily Press
Dallas Daily News
EagleTribune
EIN Presswire El Paso Inc.
Everyday Health
Fox Business
GlobeNewswire
Houston Chronicle
Huffington Post
Insurance News Net
International Business Times
LA Daily News
Lighting the Way
Medpage Today
Natural Solutions
Orange County Register
Pharmacy Choice
Pittsburgh Post-Gazette
PR Newswire
Reuters US News
Sacramento Bee
San Antonio Express-News
Seattle Local Health Guide
Seeking Alpha
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American Public Media
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Time Magazine
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WEB/BLOG SITES

Bankrate.com
Daily Press - Blog
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NJ.com
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WSBradio – Cox Media Atlanta, GA
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WSOC-CLT (ABC) – Cox Media Charlotte, NC
WTEV/WAWS – Jacksonville, FL





**BREAKAWAY FROM
CANCER**
May 10-17, 2015

The Amgen Tour of California (AToC) celebrated its tenth year anniversary this year. The AToC is a Tour de France style cycling road race that covers hundreds of miles of California's coast and inland cities and mountains. This year the eight stages were:

- Stage 1: Sunday, May 10, Sacramento
- Stage 2: Monday, May 11, Nevada City to Lodi
- Stage 3: Tuesday, May 12, San Jose to San Jose
- Stage 4: Wednesday, May 13, Pismo Beach to Avila Beach
- Stage 5: Thursday, May 15, Santa Barbara to Santa Clarita
- Stage 6: Friday, May 16, Big Bear Lake (Individual Time Trial)
- Stage 7: Saturday, May 17, Ontario to Mt. Baldy
- Stage 8: Sunday, May 18, L.A. Live to Pasadena/Rose Bowl Stadium

The stage at Big Bear Lake was relocated at the last minute to Santa Clarita due to extreme weather conditions that were being forecast for Big Bear. Race officials made the decision to move the time trial as it was in the best interest and safety of the riders. After covering 8 days and 726 miles, Peter Sagan with Tinkoff-Saxo from Slovakia won the race by two millimeters over 22 year old SRAM Best Young Rider Julian Alaphilippe from France and Sergio Luis Henao Montoya with Team Sky from Colombia. First and Second Place were separated by only two seconds!

Part of the AToC is the **Breakaway from Cancer (BFC)** initiative. Created by Amgen in 2005, BFC aims to increase awareness of the resources that are available to cancer patients from the full continuum of prevention, support, access and survivorship. This partnership includes Amgen and four national non-profit organizations who each provide one part of that continuum:
Prevention: Prevent Cancer Foundation
Support: Cancer Support Community
Access: Patient Advocate Foundation
Survivorship: National Coalition for Cancer Survivorship

AnneMarie B
New York
Hepatitis C

"Thank you for assisting me to be able to meet my co-pay for my medication a new drug that will cure Hepatitis C.

I contracted Hepatitis C from a blood transfusion in the late 1980s during labor and delivery when I had a C-section. The doctors and nurses tried very hard to save me and my infant at this time. My baby boy died. But, the blood transfusions, even though they gave me Hep C, saved my life.

I had other children at home to take care of, and I am thankful that I was able to live to raise them. I also went back to my teaching profession, and I had many wonderful years working with many students and their families.

I only recently found out I had this disease, and my doctor feels this is when I contracted it. Your gift gave me hope in being able to afford this expensive medication and a reason to continue to live.

I want to thank you again, and I will always be grateful for your wonderful organization. I am truly on my way to being cured."

A Promise of Hope Affair

14th Annual

A PROMISE OF HOPE AFFAIR



PAF Staff in the Rotunda

Patient Advocate Foundation held its 14th Annual *A Promise of Hope Affair* on February 21, 2015 at the Newport News Marriott at City Center. *A Promise of Hope Affair* has become a premier fundraising event in the Hampton Roads area, drawing over 350 guests not only from PAF's hometown, but from across the United States. This year we journeyed to "Casablanca...Round Up the Usual Suspects." Many of our guests came dressed in 1940's inspired clothing.

The event began with a Welcome Reception in the Grand Ballroom Foyer which allowed guests time to mingle and catch up with old friends. Dinner was served in the Grand Ballroom and was sponsored by Amgen Oncology. During dinner, sponsors were recognized for their financial support of the event and members of both the Anchor and



Auction Committees were recognized for their hard work in lining up sponsors and auction items. The highlight of the evening was hearing from two of PAF's Scholarship for Survivors recipients, one past, Dr. Benton Brown, and one present, Oliver Adlam. They both shared how PAF provided them with much needed financial assistance which allowed them to pursue their educational aspirations.

Ben was in medical school when he received his scholarship and is now a physician in Texas. Oliver is pursuing a degree in Engineering at Georgia College and State University

The decision was made this year that the funds raised during the silent auction and the live "fund-a-need" auction would benefit the Scholarship for Survivors program to help PAF assist more students in need. Barbara Ciara, WTKR-Channel 3 (CBS), managing editor and news reporter served as our Mistress of Ceremonies and with assistance from Alan Balch, PAF CEO, helped the "fund-a-need" auction raise over \$20,000.

As dinner, the speakers and the live auction came to an end, a jazzy tune began playing and the casino games opened. Our guests enjoyed playing blackjack, roulette and trying their hand at the craps table, all while continuing to bid on silent auction items throughout the evening via an electronic bidding system.



Becca Fifelski and Donnie Kepley with 2Day Sun entertain PAF guests during the Welcome Reception



Guests bidding during the Silent Auction



Fran Castellow, PAF President of Operations and Bill Nason, PAF Chief Operating Officer



Alan Richardson, A Promise of Hope Affair Co-Chair with Barbara Ciara, Mistress of Ceremonies for the event and her husband Artie Jarrett



US Congressman Robert C. "Bobby" Scott (3rd-D-VA), Nancy Davenport-Ennis PAF Founder and Chair Emerita and Barbara Ciara



City of Newport News, Virginia Mayor McKinley Price and his wife Valerie



US Congressman Rob Wittman (1st-R-VA) and Alan Balch, PAF CEO

Each year, the support of our Anchor Committee, sponsors, auction donors, guests, PAF staff and Board of Directors assists PAF in raising funds to support our Direct Patient Services program. Continued support allows PAF to assist patients in resolving their insurance, job retention and/or debt crisis matters relative to their diagnosis of a chronic, life-threatening or debilitating disease.

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 Bruce Breeger, Breeger Media Group
 Jeffrey W. Clemons, BB&T
 Donna McMahon, TowneBank
 Nancy Davenport-Ennis, Founder & Chairman of the Board
 Alan Balch, PhD, Chief Executive Officer
 Fran Castellow, MEd., President-Operations
 Jack Ennis, Chief Development Officer
 Alan Richardson, Executive Vice President of Strategic Patient Solutions
 Shawn Nason, Special Events Director

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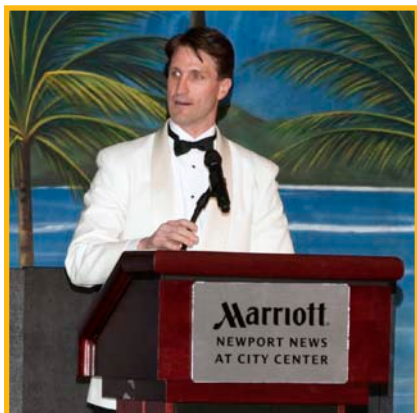
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Alan Richardson, A Promise of Hope Co-Chair and PAF EVP of Strategic Patient Solutions recognizing Event Donors



PAF CEO Alan Balch, PhD addresses the Attendees



Current Scholarship for Survivors award recipient Oliver Adlam shares his story



Andrew Balch, son of PAF CEO Alan Balch bids during the Scholarship for Survivors auction

Auction Committee

Shawn Nason, Chair	Shauna Hatfield
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Shatwanda Buckley	Danielle Jackson
Cynthia Espenshade	June Keddell
Celia Francis	Gabriella Legaspi
Rebecca Freeman	Denise Lee
Brandy Gilliam	Millie Perez-Anderson
DeShaun Hall	Lakendra Perkins
Nathan Hatfield	Kristin Shealy



Past Scholarship for Survivors award recipient Dr. Benton Brown tells how PAF, through this program, was able to help him through medical school



Leslie Fields, with Sponsor Novartis and Carey Waldrip, PAF Director of Special Projects



Sponsor Eli Lilly representative Scott Shortenhouse and Alan Richardson



Fran Castellow, PAF President of Operations and fellow members of the CIVIC Class of 2014



Andrew Weber, PAF EVP of External Relations, Tom Sellers with Sponsor Takeda Oncology and Alan Richardson, PAF EVP of Strategic Patient Solutions

Photos by Amy Ellen Lee, Twilight Studio Designs

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April Bre-Hemmendiner
Jennifer Brewster
Dr. Benton Brown
Marc & Sarah Browning
Bryan & Fran Castellow
Shonta Chambers



A Promise of Hope Affair guests tripping the light fantastic!



Several of our guests got into the spirit of Casablanca

Barbara Ciara & Artie Jarrett
 Mary Cleckler
 Chanda Cox
 Andrea & Russell Edwards
 Cynthia Espenshade
 Leslie Fields
 Yeni Garcia
 Brandy Gilliam
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 Bill & Shawn Nason
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Just give me a seven!!

16th Annual Patient Congress



Virginia Delegation Donna Adkins, US Congressman Rob Wittman (R-VA-1st), Joanna Collins, Nate Hatfield and PAF/NPAF CEO Alan Balch



Attendees at the Capitol Hill Briefing

On June 10-11, 2015 PAF convened its 16th Annual Patient Congress in Washington, DC at the Liaison Capitol Hill Hotel. With over 80 attendees, this event engaged patients, caregivers, advocacy group representatives, and National Patient Advocate Foundation (NPAF) volunteers to advance movement on issues surrounding medical debt, medical bankruptcy and the impact the issues have on patients.

During the two-day conference, advocates learned from experts in government and advocacy on how best to "amplify the patient's voice," ensuring patient representation in the legislative and regulatory process.

Several industry leaders connected with the group on the topic of medical debt and the importance of protecting patients from the hardships caused by medical debt. The agenda included the following topics: *The Health Care Landscape & Patient Voice; The Roadmap to Patient Engagement; Patient Engagement in Research; Patient Engagement at the Community Level; Patient Engagement on the Personal Level: The Consumer-based Cancer Care Value*



Senator Tammy Baldwin (D-WI) and Attendees Liz Mayes and MaryAnn Coletti

Index; Learning from Experience -- Sharing Best Practices; The Washington Landscape -- 21st Century Cures and Pending Issues; Medical Debt & the Congressional Agenda; Carrying the Message to the Hill & Beyond; Making the Most of Your Hill Visits. Speakers included: Suzanne Schrandt, Deputy Director of Patient Engagement, Patient-Centered Outcomes Research Institute; David Introcaso, Vice President, Policy Operations, National Association of Accountable Care Organizations; Thomas Workman, Principal Communication Research and Evaluator Health &

Social Development Program, American Institutes for Research; Alan Balch, Chief Executive Officer, PAF & NPAF; George Dahlman, Executive Vice President, Federal Affairs & Operations, NPAF; and Christopher Kush, Chief Executive Officer, Soapbox Consulting.

After the Capitol Hill Briefing, attendees eagerly worked their way to the Hill and conducted 124 Hill visits that included 71 in the U.S. Senate and 53 in the U.S. House of Representatives. Their visits included 58 with Democrats, 65 with Republicans, and 1 with an Independent member.

To culminate the days of hard work leading up to and during Patient Congress, a Dinner Symposium was held where attendees were encouraged to relax and enjoy the success of the past few days. Gathered in the ballroom of the Liaison Capitol Hill, the group was honored to hear from Dr. Neil Spector, Author of *Gone in a Heartbeat*. Upon completion of the keynote, an exceptional patient advocate currently battling cancer herself, Shelby Adams, was recognized for all her contributions to PAF, NPAF, and patient advocacy and presented with the *Patient Advocate Foundation Outstanding Courage and Patient Advocacy Dedication Award*.



Senator Joe Manchin (D-WV) with West Virginia Constituents



Senator Charles Grassley (R-IA) and Iowa Patient Congress Attendees



Alan Balch, PAF/NPAF CEO addressing the attendees during the Dinner Symposium

PAF wishes to thank the following sponsors for their support of Patient Congress:

- AmerisourceBergen
- Bristol-Myers Squibb
- Celgene
- Lilly
- Genentech
- Merck
- Novartis Oncology
- Pfizer Oncology
- Takeda Oncology



Shelby Adams, NPAF Volunteer and Patient Congress attendee was presented with the "Outstanding Courage and Dedication in Patient Advocacy" award



Featured Author Dr. Neil Spector signing his book "Gone in a Heartbeat" for the attendees

Scholarship for Survivors Program

The PAF Scholarship for Survivors program was created in 2000 to provide financial assistance to patients who are suffering or have suffered from a life-threatening disease or chronic condition that may have had an effect on their educational opportunities.

Each recipient receives an annual \$3,000 award for each year that they are enrolled in a higher education program. They must maintain a 3.0 or higher GPA, be a full time student and complete a minimum of 20 hours of community service work.

To date, PAF (along with other gracious funders) has awarded scholarships to 61 students totaling over \$400,000. The 2015/2016 academic year Scholarship for Survivors recipients are:
Scholarship for Survivors recipients are:

THE CHERYL GRIMMEL AWARD

Sage Chasen
Bethlehem, PA
School: Lehigh University

THE MARK STEPHENS AWARD

Yosef Glaser
Baltimore, MD
School: Bais Hamedrash & Mesivta of Baltimore

THE MONICA BAILES AWARD

Timothy Conners
Ithaca, NY
School: Ithaca College

THE U.S. REPRESENTATIVE JO ANN DAVIS AWARD

Nathan Hertz
San Marcos, TX
School: University of Texas at San Antonio

THE ROBIN PRACHEL AWARD

Hanna Hughes
Rochester, MN
School: University of Minnesota, Duluth

THE KAREN L. REEDER AWARD

Somer Greene
Los Angeles, CA
School: Occidental College

THE NANCY DAVENPORT-ENNIS AWARD

Kaela Johnson
Hampton, VA
School: Virginia Commonwealth University

SCHOLARSHIP FOR SURVIVORS AWARD

Alexa Hickman
Chattanooga, TN
School: University of Tennessee at Chattanooga

Richard Suarez
Glassboro, NJ
School: Rowan University

Kimberley Santo
Gainesville, FL
School: University of Florida

Coreyonna Welch
Carrollton, GA
School: University of West Georgia

Alexandra Xifaras
Fairhaven, MA
School: Boston University

Charity Navigator

Patient Advocate Foundation received its sixth consecutive 4-star rating from Charity Navigator, which is the highest rating given to non-profit organizations. Charity Navigator has rated over 8,000 charities throughout the United States and only 3% of the charities they rate have received at least 6 consecutive 4-star ratings. The rating is awarded based on a charity's fiscal management and commitment to accountability and transparency.



possible four stars indicates that your organization adheres to good governance and other best practices that minimize the chance of unethical activities and consistently executes its mission in a fiscally responsible way. This 'exceptional' designation from Charity Navigator differentiates Patient Advocate Foundation from its peers and demonstrates to the public it is worthy of their trust."

To view PAF's review, please visit the PAF Charity Navigator Profile at www.charitynavigator.org

Michael Thatcher, President and CEO of Charity Navigator said that "Receiving four out of a

Dorland Health

Patient Advocate Foundation was again recognized by Dorland Health with two Case in Point Platinum Awards in 2015. One award was for Managed Care Programs which recognized PAF's Case Management Team for their navigation of patients through the complex healthcare issues affecting them and providing the best possible resolution to their case and care. The main focus for this award was on the assistance provided with debt relief as it applies to denials and appeals assistance.

The second Case In Point Platinum Award was in recognition of Case Management Specialty Programs; Social Work Case Management acknowledging PAF for providing responsive, adaptive healthcare initiatives to a rapidly emerging health crisis. PAF was recognized for the Disaster Support Initiative which provided assistance to patients who had been impacted by the Boston Marathon bombing and the West Texas Fertilizer plant explosion.

Steve M.
Texas
Metastatic Melanoma

"This is not a fancy letter of appreciation for your financial support but it is deeply sincere. We are a couple who have worked hard to raise our family and pay our bills. If anyone needed help, we were there any hour of the day. We never asked for much but always gave. It is people like you that have made our struggle with cancer better. Thank you for caring!"
Steve and Carol

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 W. Jackson Wisdom
 Alan Wood
 Lisa Wright
 Janay Wynn
 Nidia Yambo
 Ezaz Zahir

In Memory Of

Dianne Allen
 Joann Dayton
 Shampoo No. 1 Ltd.
 Mary Louise Gillespie
 Clyde & Mary Jo Balch
 Thomas Sloan
 Dennis Bolognini
 Matteo Alioto
 Ivette McFarland
 James Zrimsek
 Margie Blair Booker
 Viskase Corporation
 Christopher Brideau
 Scott Brideau
 Joseph Cagiano
 Vincent Agnello
 Deborah Cerbone
 Shane Courbier
 Donatic
 Conrad Giuliano
 George Giuliano
 Marie Grasso
 Carmella Irizarry
 Annette Krause

John Laico
 Mr. & Mrs. John Passantino
 Anthony Ribaudo
 Bernadette Samuels
 Arlene & Lisa Scognamillo
 Joseph Valenti
 Christine Zemla

Dominic Chimienti
 Catherine Gempka
 Sheila S. Crowe Fund –
 Multiple Myeloma
 Annette Krause
 Phyllis Decker
 Gerald Decker

Maria Dolores DeMelo
 George Teixeira

Lissa Dotdson
 Thomas Sloan

Elsie Engle
 Denise Angle
 Patrick Angle
 Patrick & Coral Angle
 Christine Boyle
 Joanne Engle
 Roland Harmon
 Loretta Mackay
 Laura Marrone
 Jean Puleo

Louis Fancelli
 Rose Fancelli
 Marshall Howland
 Karen Howland

Evelyn Hurt
 William Hurt
 Joseph S. Kaiser
 Mary Ann Kaiser

Clara Katchen
 James Cruickshank
 Jackie Parker
 Andrew Rome

Lou LaMarca
 Bristol-Myers Squibb
 Max Larios

Erika Larios
 Karina Larios-Pliego
 Rene Larios

Vilma Macdonald
 Jean Brown
 Gene Costella
 Marlene Gardner

Barbara Mayweather
 Kethia Webber

John McClure
 Joe Brown
 Walter Sobryan
 T.L. Hanna High School

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 Thomas Green

Jose Pedreira
 Lisette Pedreira

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Alfred Schumann
 A. Herrera
 Sandra McBride
 James Royea
 Vicki Schmidt

Robert Sloan
 Thomas Sloan

Kevin Taylor
 Debra Taylor

Melton Wayne Tedrow
 Jackie Belcher
 Steve Harmon
 Joan Yell

Norberta Teixeira
 Azorean Alliance
 Jose Araujo
 Orlando Ataide
 Herberto Bettencourt
 Monica Blagrove
 Elizabeth Bogosian
 Norma Davila
 Elvira DaSilveira
 Barbara Dodd
 Chuck & Odette Ebersole
 Conrad Giuliano
 Peggy & Ian Mackinnon

Mariana Nunes
James Rich
Mr. & Mrs. Jerry Rich
Teofla Rich
Joao & Maria Rosa
Nicki Sharpe
Joao Silveira
Olimpia Silveira
Maria Silva
Mary Anne Small Capistrano

Joanne Ufolla
Brian Dunn

Merle Walton
Kay Martin

Sharon Alice Wills
Brian Keane
Susieann Taylor

In Honor Of

Don Angel
Fidelity Charitable Gift Fund

Alan Balch, PhD
Patient Resource LLC

Randolph Balch
Dr. Alan Balch

Anne Brosnan
James McMahon

CV RML Team
Kimberly Gwinn
Fran Castellow, MSED
Patient Resource LLC

Willie Mae Cummings
Rodney Cummings

Nancy Davenport-Ennis
Jane Gardner
Patient Resource LLC

Elaine Eckert
Robert Rickles

Josh Gould
Li Jun
Courtney Keppler
Eric Keppler

Christine Hydock
Lori Beard
Robert Eisenhower
Russell Engle
Heather Herb
Annette Karahuta
Kara Leshner
Bonita McCoy
Letitia McCrae
Laura Miller
Sherry Murphy
Vipul Saini
Christina Wehr

Leslie Licata
Andrea Rustage Kutner

Margaret-Mary Little
Bernadette Castelli

Kathy Milward
John Milward

Edgar G. Miranda
Long Island Community
Foundation

Amber Padron
Daniel Marder

Lucienne Poyau
Chantal Small

Alan Richardson
Merall Consulting, Inc.

Robert M. Rifkin, MD
The James P. & Leslie K.
Morley Family Charitable
Fund

Jennifer Saulman
Jan Saecker

Susan Shulstein:
Barry Shulstein

Vani B.
Illinois
Narcolepsy

“My insurance company denied coverage of medication I have been on for 8 years. They cited inadequate documentation from my doctor’s office. PAF assisted me with the many phone calls, conference calls, doggedly asking questions that I would have not thought to ask.

I was impressed with my case manager’s knowledge and perseverance. She knew the appropriate questions to ask. Her familiarity with the bureaucracy helped get my medication approved.

Of course the insurance company has only approved until the end of the year. I may need to call PAF in January!

Thank you PAF.”

PAF Financial Statements

Patient Advocate Foundation Statements of Financial Position June 30, 2015 and 2014

	2015	2014
ASSETS		
Current assets		
General operating cash and cash equivalents	\$ 3,425,252	\$ 4,121,397
Restricted cash and cash equivalents	72,022,026	41,733,713
Unconditional promises to give	1,603,086	183,529
Service contract receivable	447,282	426,523
Employee travel advances	300	476
Other receivable	5,590	—
Inventories	57,869	47,958
Prepaid expenses	355,231	476,623
Investments and cash equivalents	1,933,371	1,909,422
Total current assets	79,850,007	48,899,641
Property and equipment - net	4,522,313	2,403,781
Other assets		
Refundable deposits	53,331	53,331
	<u>\$ 84,425,651</u>	<u>\$ 51,356,753</u>
LIABILITIES AND NET ASSETS		
Current liabilities		
Current portion of obligation under capital lease	\$ 68,770	\$ 64,869
Current portion of long-term debt	217,918	—
Accounts payable and accrued expenses	907,630	1,276,956
Due to related party	84,191	104,390
Deferred revenue	3,246,672	3,304,936
Accrued vacation leave	225,230	229,833
Total current liabilities	4,750,411	4,980,984
Long-term liabilities		
Long-term debt	1,062,082	—
Obligation under capital lease - less current portion	72,654	150,235
Other liabilities	101,764	90,855
	1,236,500	241,090
Total liabilities	5,986,911	5,222,074
Unrestricted	3,680,105	2,582,399
Unrestricted - board designated	1,933,371	1,909,422
Total unrestricted net assets	5,613,476	4,491,821
Temporarily restricted	72,825,264	41,642,858
Total net assets	78,438,740	46,134,679
	<u>\$84,425,651</u>	<u>\$51,356,753</u>

Patient Advocate Foundation
Statements of Activities

Years Ended June 30, 2015 and 2014	2015				2014			
	Unrestricted - Board		Total	Temporarily Restricted	Unrestricted - Board		Total	Temporarily Restricted
	Unrestricted	Designated	Unrestricted	Temporarily Restricted	Unrestricted	Designated	Unrestricted	Temporarily Restricted
Revenues, gains and other support								
Contributions:								
Grants	\$ 3,603,734	\$ -	\$ 3,603,734	\$ 59,530,424	\$ 3,838,793	\$ -	\$ 3,838,793	\$ 44,166,677
Private and public donations	145,021	-	145,021	-	58,163	-	58,163	-
Donated services and materials	71,727	-	71,727	-	63,220	-	63,220	-
Program Administration	11,599,860	-	11,599,860	-	10,810,595	-	10,810,595	-
Patient Congress	77,500	-	77,500	-	255,315	-	255,315	-
Promise of Hope	251,504	-	251,504	-	255,502	-	255,502	-
Miscellaneous income	422,272	-	422,272	-	419,560	-	419,560	-
Investment income (loss)	373,693	23,949	397,642	-	183,911	63,132	247,043	-
Net assets released from restrictions								
Satisfaction of program restrictions								
Financial Aid Awards	28,348,018	-	28,348,018	(28,348,018)	33,336,115	-	33,336,115	(33,336,115)
Total revenues, gains and other support	44,893,329	23,949	44,917,278	31,182,406	49,221,174	63,132	49,284,306	10,830,562
Expenses and losses								
Program services:								
Patient/educational services	5,972,514	-	5,972,514	-	6,104,503	-	6,104,503	-
Financial Aid Programs	32,204,574	-	32,204,574	-	36,879,762	-	36,879,762	-
Service contracts	2,857,891	-	2,857,891	-	2,592,607	-	2,592,607	-
Supporting services:								
Management and general	1,509,599	-	1,509,599	-	1,499,698	-	1,499,698	-
Fundraising	1,251,045	-	1,251,045	-	1,094,097	-	1,094,097	-
Total expenses	43,795,623	-	43,795,623	-	48,170,665	-	48,170,665	-
Loss on abandonment of fixed assets	-	-	-	-	2,700	-	2,700	-
Total expenses and losses	43,795,623	-	43,795,623	-	48,173,365	-	48,173,365	-
Change in net assets	1,097,706	23,949	1,121,655	31,182,406	1,047,809	63,132	1,110,941	10,830,562
Net assets - beginning of year	2,582,399	1,909,422	4,491,821	41,642,858	1,534,590	1,846,290	3,380,880	30,812,296
Net assets - end of year	\$ 3,680,105	\$ 1,933,371	\$ 5,613,476	\$ 72,825,264	\$ 2,582,399	\$ 1,909,422	\$ 4,491,821	\$ 41,642,858
								\$ 46,134,679

FY 2014/2015

COMBINED FUNCTIONAL EXPENSES FY14/15

Program Services	\$41,034,979.00	93.7%
Management & General	\$1,509,599.00	3.4%
Fundraising	\$1,251,045.00	2.9%
Total	\$43,795,623.00	

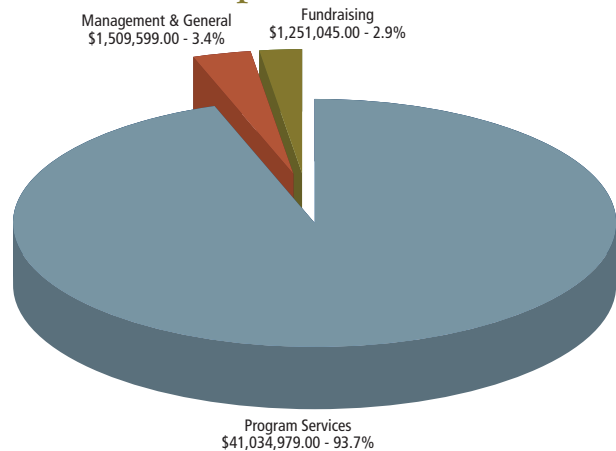
COMBINED REVENUE AND EARNINGS FY14/15

Program Grants	\$63,134,158.00	83.0%
Program Administration	\$11,599,860.00	15.2%
Gifts & Contributions	\$567,293.00	0.7%
Interest	\$397,642.00	0.5%
Event Revenue	\$329,004.00	0.4%
In-Kind Service	\$71,727.00	0.1%
Total	\$76,099,684.00	

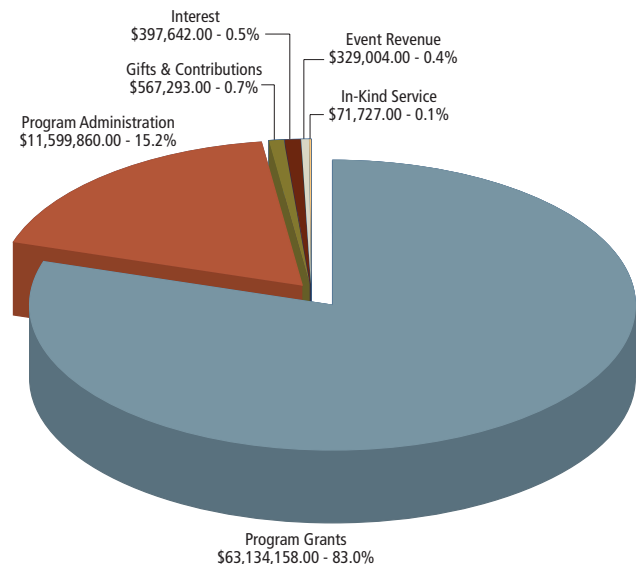
COMBINED PROGRAM ACTIVITIES FY14/15

Financial Aid Grants & Administration	\$32,204,574.00	78.5%
Case Management, Outreach & Education Programs	\$5,972,514.00	14.6%
Service Contracts	\$2,857,891.00	7.0%
Total	\$41,034,979.00	

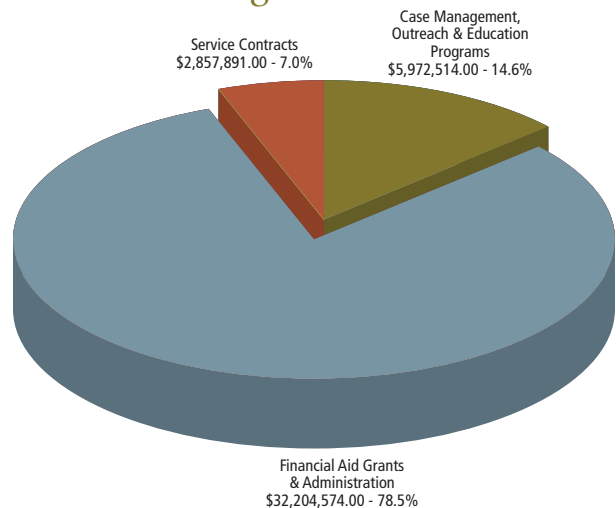
Functional Expenses



Revenues



Combined Program Activities





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