

Hands-on Help from the Nation's Largest
Comprehensive Healthcare Safety Net Charity

**MORE
MORE
MORE**

**SUPPORT
CONDITIONS
PATIENTS**



2023 ANNUAL IMPACT REPORT

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Our History

PAF was founded in 1996 by Nancy Davenport-Ennis and co-founded by John H. (Jack) Ennis to help address the issues faced by patients like their friend Cheryl Grimmel, who had to battle not only her breast cancer but for access to affordable treatments. In PAF’s first year, Nancy and a part-time volunteer staff of 2 provided case management assistance to 157 patients who faced barriers to prescribed care. Fast forward to 2023 and we’ve provided direct, hands-on help to more than 2 million patients nationwide.

WELCOME

It’s hard enough to have a life-threatening, debilitating, or chronic condition and also be able to afford health insurance, recommended treatments, and medications. But when you struggle to pay for those essential costs as well as for necessities like food, transportation, shelter, or time away from work, then your experience is likely to be overwhelming emotionally and financially.

Unfortunately, the financial headwinds are only getting stronger for many people. Federal and state assistance is harder to secure, due in part to state reductions in Medicaid and the shrinking availability of dedicated staff in entitlement programs that help older adults, those with disabilities, and those in poverty. Community resources also are strapped, with fewer staff and smaller budgets to meet local needs. And patients, particularly in rural and semi-rural areas, face increasingly fewer options for healthcare services leading to reduced access and longer trips to primary, hospital, and specialty care.

Unequal access to care increases health disparities and inequities, but the collective will to combat those issues has never been stronger.

Patient Advocate Foundation has been in the trenches for almost 30 years, doing everything we can to make sure patients and those who care for them have critical assistance when they face acute financial and administrative burdens, especially those exacerbated by social determinants of health. **Patient Advocate Foundation is the largest comprehensive healthcare safety net charity in the country, offering hundreds of millions of dollars in services and programs spanning multiple areas and diseases.**

We reached 93% of all counties in the U.S. with assistance in 2023 including the 226 counties with the highest rates of social vulnerability and chronic disease burden.

Whether it is through case management support, financial assistance, patient education and advocacy tools, health services and community-based research, or dedicated community outreach and engagement in places where the need is greatest, we find ways to provide more support to more people with more conditions. This report reflects the impact of our efforts. The testimonials shared by patients like Quentin (p. 6) and Mary (p. 7) represent many thousands more who come to us every day seeking relief from health disparities. Their struggles to access care while also navigating daily necessities drive us to keep improving.

Our focus continues to be on providing meaningful and measurable help, one patient at a time and one community at a time. The struggle it takes to meet life’s daily challenges when you are sick has never been greater. Our goal at PAF is to help people overcome barriers to affordable and equitable access to healthcare so they have a better chance at the health outcomes and quality of life everyone deserves.

Thank you for helping PAF meet that goal.



Alan J. Balch
Alan J. Balch, PhD
Chief Executive Officer



What Our Patients
Are Saying...

*“My case manager was **EXTREMELY** helpful to me! She conquered every barrier that I was faced with. She called my pharmacy, my doctors’ offices, and the hospital in order to fix the issues that were at hand. She did not hang up until EVERY issue and task was complete! I cannot stop thanking her enough! The world needs more like her!”*

– Yocinthia, Breast Cancer

Each patient directly helped by the organization receives a standardized, post-encounter survey, available online or in hard copy and in both English and Spanish, to assess overall patient satisfaction and program impact levels. The 2023 combined survey completion rate was 3%.

★ 96% indicated that PAF resolved their issue

Overall PAF Staff Rating

👍 4.6/5

for their communication, knowledge & professionalism

93% of respondents would recommend PAF to others

OUR PATIENT REACH 2023

5M+	page views welcomed by PAF websites
2.5M+	people reached through direct service, education, & outreach
700K+	patients & families supported
185k+	patients received direct, sustained help
958	distinct diagnoses (582 distinct rare diseases)
\$450M+	direct financial support distributed to patients
\$18M+	debt relief obtained on behalf of case management patients

Our Patient Programs

Case Management	Financial Assistance Services
27 total unique programs	15 patient assistance programs provide financial support to patients across 180 unique funds
14 serve patients living with a diagnosis other than cancer	57 disease funds assist with medication costs
13 serve patients living with cancer	19 disease funds with focus on Health Equity
6 with focus on Health Equity	32 funds provide travel assistance to patients
11 programs fully administered by PAF for other non-profit organizations	90 funds provide cost-of-living assistance to patients
4 academic partnerships	1 fund provides funeral expenses to bereaved families

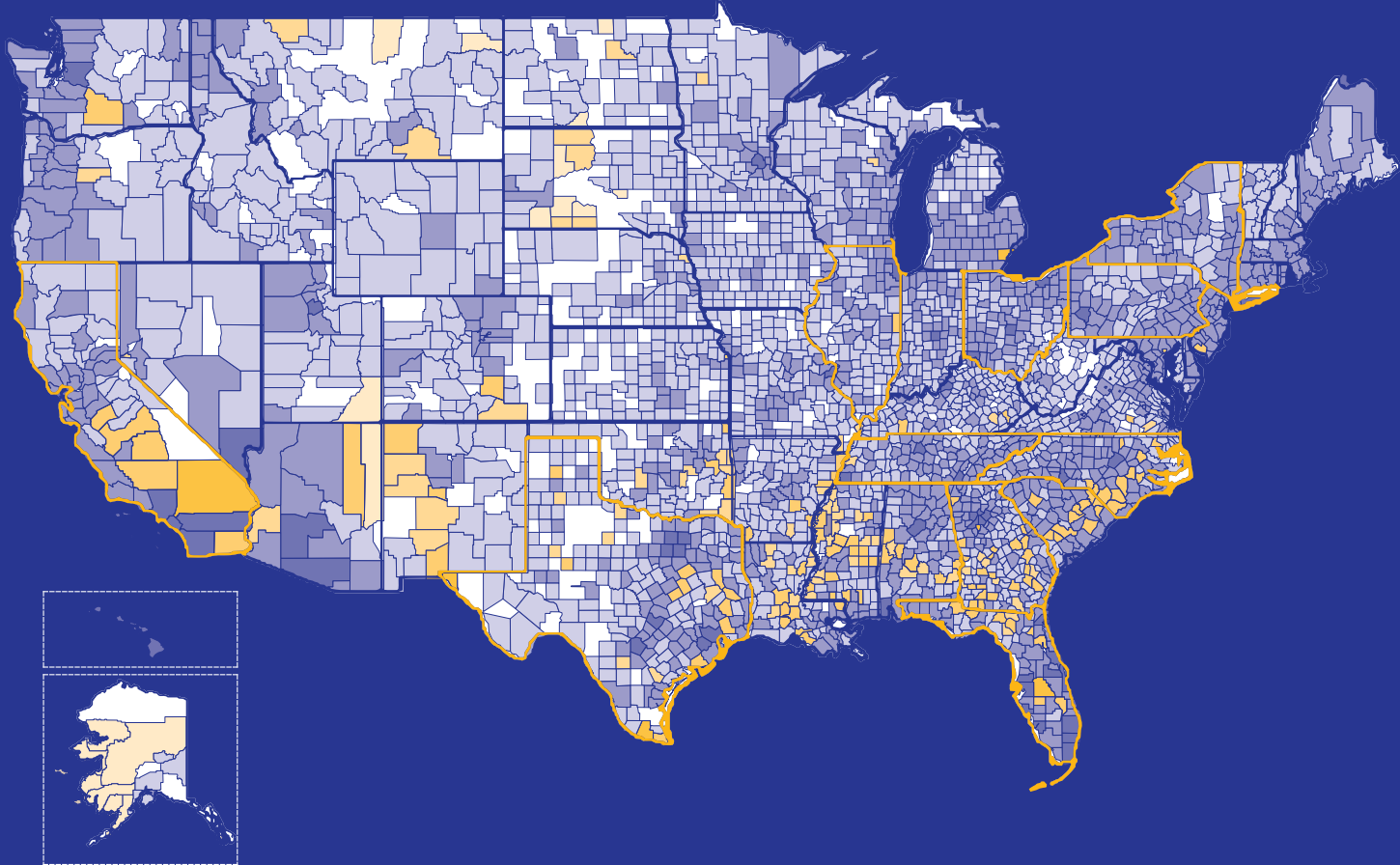


2,063,903

Patients directly helped by PAF since 1996

OUR NATIONWIDE PRESENCE

We helped patients in all 50 states, Puerto Rico, Guam, and Virgin Islands, **reaching 93% of all US counties with assistance in 2023**. Using county-based data, the heat map below represents the locations of patients served, including the 226 designated Health Equity counties spanning 36 states. These counties were selected as areas of focus through a methodology that used the Centers for Disease Control’s Social Vulnerability Index (SVI) combined with CDC disease incidence data to identify those with the highest rates of social vulnerability and high rates of multiple chronic diseases.



Number of Patients Helped by PAF per County	Number of Patients Served in Health Equity Counties	PAF Top 10 Patient Service States
<ul style="list-style-type: none">Less than 1011-250 Patients>250 Patients	<ul style="list-style-type: none">Less than 1011-250 Patients>250 Patients	<div>Florida Texas Georgia California North Carolina</div> <div>New York Ohio Tennessee Pennsylvania Illinois</div>

PAF Case Resolutions

-  Expedited Medicare enrollment*
-  Obtained Social Security disability approval with retroactive back pay
-  Secured resources for various cost-of-living needs
-  Provided insurance education

2023 Administrative Burden Micro Survey

64%	reported experiencing administrative burden in the past 12 months
of those...	
55%	spent time on health insurance administrative tasks
20%	spent time on safety-net (non-medical) applications
39%	received assistance from a case manager or other professional to complete administrative tasks

The ALS Association partners with Patient Advocate Foundation to provide the ALS Insurance and Benefits Resource Line, providing individualized case management assistance for people living with ALS, their family members, and caregivers.

>>Request assistance online at als.pafcareline.org or call toll free 1-844-244-1306

My case manager treated my situation like it was hers. She was a blessing to my family because it was hard times for me. I was denied Social Security and Medicaid for two years. I was recommended to the ALS Insurance and Benefits Resource Line and [referred to a case manager at PAF]. She got my benefits for me in two months. My family and I can't thank her enough. She was on the situation more than I was. She called me almost every week to check on me and I truly appreciate that. I would not have gotten this done without her. Thank you and God bless ... "



– Quentin, Amyotrophic Lateral Sclerosis (ALS)

*Public Law 106-554 amends section 226 of the Social Security Act to waive the 24-month waiting period for Medicare coverage for disabled individuals medically determined to have Amyotrophic Lateral Sclerosis (ALS).

>> secure.ssa.gov/poms.nsf/lnx/0423580001

As a widow, I have found myself in a difficult financial situation. I have heart failure and mitral valve regurgitation. However, thanks to modern medicine and my own lifestyle choices, I am optimistic that I have some good years ahead of me, as I will be turning 82 soon. Unfortunately, the burden of medical bills, including those for my treatments, hospital stays, and ambulance services, has been overwhelming. To make matters worse, I also struggle to cover my rent, which takes up half of my total income. Moreover, the rising costs of food and energy due to inflation have increased my stress and exacerbated my heart problems. PAF's case management assistance and the grant I received [from their] Heart Valve Financial Aid fund has been a tremendous relief. It has significantly reduced my stress levels and allowed me to focus again on my passion for writing and publishing books... I am truly grateful."



– Mary, Heart Failure

PAF Case Resolutions

-  Negotiated unpaid ambulance bills
-  Assisted with successful small grant application
-  Facilitated connection to available local agencies for cost-of-living support
-  Educated and provided resources for financial hardship

2023 Case Management Data

42%	of patients reported cost-of-living issues
22%	of case resolutions involved assisting with medical bills
41%	of patients earned less than \$24,000 annually
9%	of patients were over 75

STRUCTURAL HEART DISEASE CareLine

Patient Advocate Foundation's Structural Heart Disease CareLine provides free and confidential navigational assistance with financial and practical challenges that impact a patient's ability to access healthcare.

>> Request help or learn more about our services at structuralheart.pafcareline.org

MORE EQUITABLE HEALTHCARE ACCESS

Nearly
\$19M+
in debt relief obtained
on behalf of case
management patients

41% earned less
than \$24k
while
17% earned
over \$72k
↑20% increase

42% reported
financial
cost-of-living
issues

12% were
uninsured

63%
were referred by
healthcare institutions,
professional, and other
non-profit organizations


PAF case managers provide critical assistance to help patients diagnosed with life-altering diseases navigate equitable access to healthcare services, disability and insurance benefits, and essential cost-of-living support programs. We helped 16,902 patients with 958 distinct diagnoses in 2023, with direct interventions resulting in \$18,933,473 in debt relief secured on behalf of patients. The patients who come to PAF for help represent all of us – all states, all ethnicities, all income levels and all insurance statuses – and all share an inability to obtain necessary medical care or afford necessities such as food, housing, utilities, and transportation.


The ecosystem of safety net support PAF provides to patients has never been more important than it is today. Data reflects increased patient need and more case management interventions needed to resolve patient cases in 2023, with 27 contacts, on average, needed to reach resolution (a 19% increase over 2022), and 32% of patients with needs spanning more than one issue category.


Patient Advocate Foundation's
**Health Equity
Case Management Program**

PAF's Health Equity (HE) Case Management Program is part of our overarching Health Equity Initiatives, which are designed to reach and serve certain populations that experience inequities in the healthcare system and social needs gaps associated with the social drivers of health.

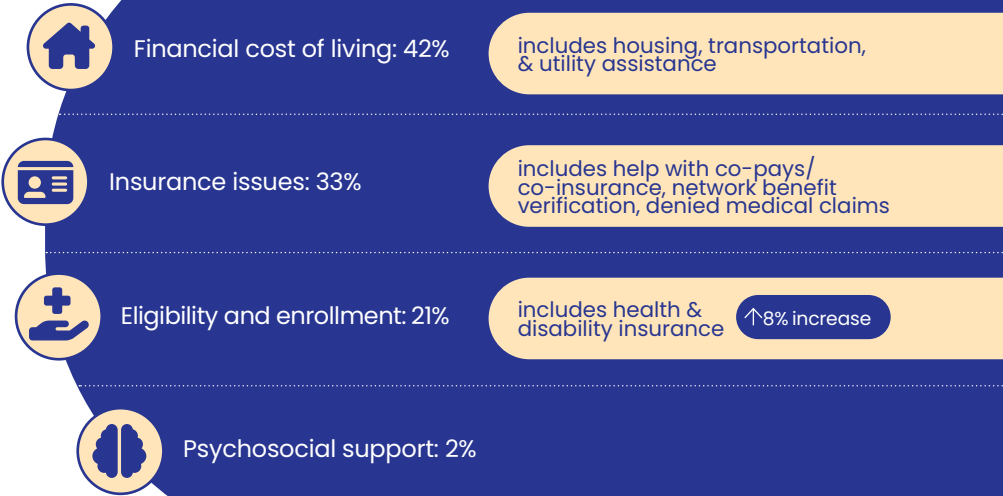
2023 highlights from this work include:

 Service to 777 patients in one of the 226 counties across 36 states identified as having both the highest social vulnerability scores and high rates of multiple chronic disease

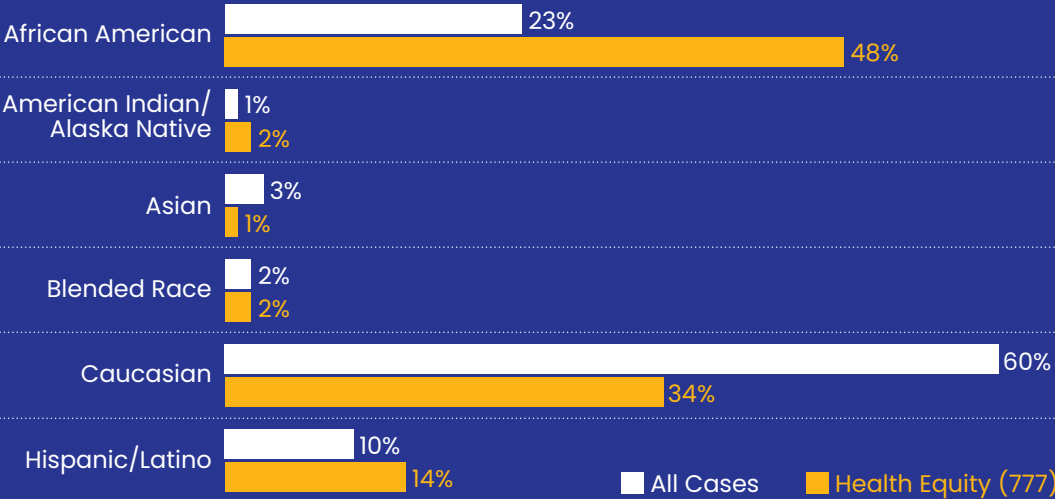
 55% of HE patients earned less than \$24,000 compared to all case management patients at 41%

 47% of HE patients were unemployed or retired compared to all case management patients at 38%

Case management issue categories reflect:



Health Equity Case Management Program cases reached more diverse ethnicities



We experienced shifts in the patients and families who turned to us for help in 2023, with 63% being referred to us by healthcare institutions or professional and other non-profit organizations. More than 41% of patients earned less than \$24,000 while 17% earned over \$72,000. Thirty-one percent were employed, 25% were retired, 20% were disabled, and 12% were uninsured. The number of African American patients helped in 2023 increased by 5%, representing more than 23% of all case management patients, with increases also observed in those identifying as Asian and Blended Race.

Of the 27 distinct case management programs in 2023, 11 were fully supported by grants and/or non-profit partnerships, 2 were new, 4 were academic collaborations, and 2 were administered by PAF for other non-profit organizations. These highly valued program partnerships pair organizational strengths and expand the reach and scope of available assistance for patients and their families.

>> To explore PAF programs and case management services, visit tiny.cc/paf-case-management

New for Patients!



Sharsheret Insurance Advocacy CareLine: PAF partnered with Sharsheret to help patients diagnosed with or at risk of breast and/or ovarian cancer through the provision of one-on-one case management navigation to address health insurance complexities and financial stressors.



Project Expansion: Fred Hutch RO1 CREDIT study: PAF case management was exclusive to the intervention arm of the Fred Hutch RO1 CREDIT study. This project, which extends through 2026, will address financial needs of cancer patients, track outcomes, and study intervention support to patients over the project period.



More Patients Accessing Programs

Ongoing strategic communications and outreach activities sought to increase awareness and utilization of PAF case management programs that provide specialized assistance to select populations. These efforts resulted in significant patient growth in programs including:

- 75% growth in patients served by the Sickle Cell CareLine
- 37% growth in PanCAN Financial Navigation
- 27% growth in the ALS Medicare Resource Line



We are PAF case managers, bringing diverse backgrounds together to serve patients



>> vimeo.com/832289956




My partner had complex shoulder surgery [for a rare sarcoma] that required him to go to an out-of-network specialist and his insurance company denied the claim despite initially assuring us that it should be covered. Our case manager was able to coordinate extensively with the hospital and the insurance company to successfully appeal the denial and get them to make an exception and bill it as an in-network procedure, which reduced the cost to a tiny fraction of what it would have been otherwise. She was extremely patient, attentive, and endlessly helpful both in advocating for him to the companies involved and in advising us on how to advocate for ourselves. I cannot even express how much her expert guidance, reassurance, and tireless help reduced our stress around this process. Frankly even if the appeal had not been successful, just having someone so knowledgeable and kind in our corner to help us navigate the process would have made a world of difference in a highly anxiety-inducing situation ... I truly don't know how we would have gotten through this process without PAF."



—Marcus, partner of patient
Osteochondromatosis of the Bone

MORE FINANCIAL HELP

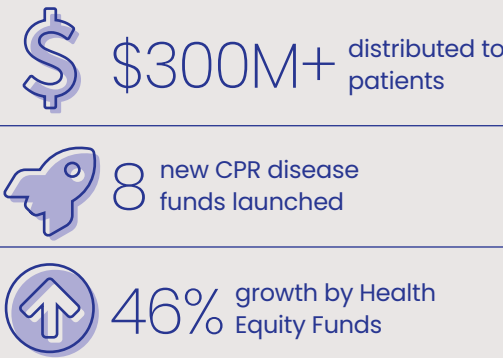
Co-Pay Relief


Nearly
84k
patient
approvals
in 2023
↑18% increase

The cost burden created by a diagnosis can be devastating, rendering many patients unable to afford necessary care absent financial help. PAF’s Co-Pay Relief (CPR) program helps improve access and reduce financial distress experienced by eligible, low-income patients by providing direct financial assistance for insurance premiums, co-payments, co-insurance, and deductibles for medications prescribed to treat and manage disease. In many funds, help with ancillary services is also available. Launched in 2004, CPR operates in compliance with the guidance provided by the Office of Inspector General while delivering best-in-class service with an emphasis on ease of access and high-quality patient service.

CPR approved 83,999 patients for critical assistance in 2023. Patients were served through a total of 48 open disease funds, with grant payments totaling \$300,832,399.

The program further expanded its service to new patient populations through the launch of the Small Cell Lung Cancer and Thyroid Eye Disease funds in 2023. Our Health Equity (HE) Funds grew by 46% through the addition of new funds serving people living with Alzheimer’s Disease, Parkinson’s Disease, Chronic Obstructive Pulmonary Disease, Heart Failure, HIV, Aids & Prevention, and Uterine Cancer.



Welcome to the
Co-Pay Relief Health
Equity Funds!



>>tiny.cc/cpr-welcome

PAF established the Co-Pay Relief Health Equity Funds using the CDC’s Social Vulnerability Index (SVI) and CDC Disease Incidence data to identify 226 counties across 36 states with the highest rates of social vulnerability and high rates of multiple chronic diseases. We rely on strategic resource allocation to direct assistance to specific populations with unequal access to safety net services and resources.

The HE funds support eligible patients living in the identified counties using the zip code of the patient’s home address. All other eligibility requirements, and fund operations, are the same as CPR general funds.

>> [Learn more at copays.org/health-equity](https://copays.org/health-equity)

Financial Assistance Funds

PAF’s Financial Assistance Funds award small grants to eligible low-income patients for non-medical expenses including transportation, food, housing, short-term lodging, and utilities. These funds provide critical help to patients who have compromised access to necessities, extending a safety net of support to these families.



New Financial Assistance Programs in 2023 include:

Mia’s Miracles Financial Assistance Fund, in partnership with Mia’s Miracles Foundation, was founded by pro golfer Camilo Villegas and his wife Maria Ochoa following the loss of their daughter to brain cancer. The fund offers a one-time \$1500 grant to eligible pediatric patients with brain cancer for transportation, lodging, housing, utilities, childcare, and nutritional expenses related to treatments.

ARDS Alliance Sumita Dixit Recovery Fund, in partnership with ARDS Alliance, offers a one-time \$500 grant to eligible patients with acute respiratory distress syndrome for transportation, lodging, housing, utilities, childcare, nutritional expenses, and lost wages related to treatments.

Oklahoma Transportation Financial Aid Fund offers a one-time \$300 grant for transportation expenses to prostate cancer patients receiving treatment or maintenance therapy and residing in Oklahoma.

Thyroid Eye Disease (TED) Financial Aid Fund provides a one-time \$1,000 grant for transportation, lodging, housing, and utility expenses to patients with TED receiving treatment or maintenance therapy.


PAF also partners with other non-profit organizations to manage the administration of their financial assistance programs. In 2023, PAF’s financial aid funds delivered assistance to 65,091 patients, distributed a total of \$152,648,078 to patients in need, and launched 53 new financial assistance funds.



“It has been a blessing to receive financial support for my transportation. I am on Social Security only ... So, this \$300 really helps. Thank you so much and God-bless.”

MORE RESOURCES TO ADDRESS BARRIERS

PAF educational initiatives provide consumers with actionable advice, guidance, and resources that improve their experience and empower their actions to achieve access to equitable, affordable, quality healthcare. Our resources address a range of topics from health insurance navigation to financial barriers to care. Content is available in many formats, including audio, interactive training modules, multimedia resource tools, full-length publications, and tip sheets.


 36,947 PAF publications directly distributed

 61 educational resources created in 2023
9 in Spanish

New!

PAF's Medicare Resource Center helps consumers make sense of their benefits, find help with costs, and learn about changes the Inflation Reduction Act of 2022 may have on their Medicare coverage. This interactive center offers critical guidance to individuals navigating the complexities of the Medicare system with content dedicated to Medicare coverage, enrollment, appeals, and more.

 6K+ page views in 2023

 Aprovechar al Máximo sus Prestaciones de Medicare
>> tiny.cc/aprovechar

The National Financial Resource Directory (NFRD), PAF's most utilized automated resource tool, garnered more than 90,000 searches by users in 2023. The NFRD supplies users with a comprehensive list of relevant resources based on their selected search criteria, introducing lasting solutions to each user's unique circumstances. It was newly rebuilt and launched in May and features a reporting mechanism, redesigned front-facing display, results page, available second-layer filters, a user tutorial, and expanded content.

>> tiny.cc/paf-nfrd

 4M+ matched resources provided to users
↑325% increase

EXPERIENCE THE STORY




Experience a video tour of the NFRD



>> vimeo.com/822986118

Our Education Resource Library (ERL) is the central hub for publications, learning series, audio segments, and customizable interactive tools that equip patients, caregivers, healthcare professionals, and others with critical knowledge and resources. Promotional activities this year increased awareness of ERL resources among new and diverse healthcare consumers and those who support them.

>> education.patientadvocate.org

 157% increase in ERL average daily content views

The Top 5 Educational Resources in 2023



Navigating Assistance Programs, Finding Help Tip Sheet

Engaging with Insurers: Appealing a Denial

Navigating Assistance Programs: Improving Your Chances for Help Tip Sheet

Living Smart, Spending Smart: Addressing Utilities, Housing, Transportation, and Nutrition Costs Head-On

Making the Most of Your Medicare Benefits: A Guide to Navigating Medicare with Confidence

 The Education Resource Library earned a Bronze Award for its web-based digital health resources. 

 **Matters of the Heart**
Working together for health...because it matters

Combining the best resources from top non-profits and clinical experts in the field of cardiovascular treatment and research, Matters of the Heart (MOH) is our self-directed online educational tool that provides tips and resources on topics including prevention, living a heart-healthy lifestyle, and managing insurance or financial challenges. MOH served 2,913 unique visitors who made 7,536 page visits in 2023.

The Patient Advocate Foundation would like to recognize and thank Amgen and Edwards Lifesciences for their support and program sponsorship of our Matters of the Heart tool.

AMGEN

 Edwards Lifesciences

MORE ENGAGEMENT WITH MORE AUDIENCES

Corporate communication activities connect with broad, new, and diverse public audiences, linking individuals and communities to essential PAF programs, educational resources, and collaboration opportunities while increasing awareness among those unfamiliar with the organization. Data evaluation helps identify communication preferences, engagement trends, and gap areas informing the development and dissemination of video, audio, and print communications. Efforts aim to amplify PAF’s patient safety net ecosystem.

People Met Us in New Places



PAF’s YouTube channel introduces visitors to patients we serve and the staff who provide direct assistance. Our YouTube audience grew by 41% and the channel featured more than 100 unique videos, 22 newly produced in 2023. **Video content engagement exceeded 99,000 this year.**

Joni’s Message
>> youtu.be/OgzTyIRZr-E



Stumped by insurance appeals?
>> youtu.be/laajitovs8Q



Strategic awareness campaigns for case management and Co-Pay Relief Health Equity initiatives reached individuals in AL, CA, GA, FL, MS and SC counties (gap areas where there were no PAF patient cases in the past three years). Working with iHeart Media, campaigns included streaming and podcast audio and digital display banners. Using applied geo tracking and diagnosis indicators, messaging was delivered to specific populations prompting them to act on new awareness of resources.



Listen to a campaign
>> tiny.cc/paf-iheart



“I’m a LMSW and I work as a patient support specialist at a blood cancer foundation. My coworker made me aware of your Lighthouse Training Series and I just finished reading the first tip sheet on paying for medications. THANK YOU so much for putting this information out there! I will be sharing this information with my blood cancer patients and using it myself as a reminder of ways to help when a patient is in need. I truly appreciate it.”

—Angela
>> bit.ly/LighthouseTrainingSeries



What Did Our Audiences See?



E-Mail Subscriber & Content Engagement

We grew and further activated PAF online subscriber communities, both in English and Spanish with crafted e-mail communications based on their selected topics, shared through e-mail, social media, websites, and directly to our community and non-profit partners.

32% growth in general PAF subscribers

92% growth in Spanish subscribers

Nearly 50k active PAF subscribers

87 crafted e-mails produced and distributed:

1M+ e-mail subscribers reached **↑49% increase**

487k+ opens received

45% overall open rate experienced
exceeding MailChimp’s peer group average of 36%

99k+ total engagements with PAF video content (views + impressions)

608k+ combined direct engagements with video and e-mail content

A Focus on Our Spanish Language Audiences

2k+ PAF Spanish language subscribers

3.8k+ Views
2.5k+ New Users
of the Spanish language website
>> espanol.patientadvocate.org

MORE EQUITY PARTNERS & INITIATIVES

PAF's community outreach and engagement strategically and intentionally meets people where they are, in the communities where they live, work, play, and pray. Through Health Equity Initiatives, we establish and cultivate partnerships with community-based organizations and frontline stakeholders to ensure PAF's portfolio of services can reach people who need them the most. Our approach brings about sustainable change by connecting those who routinely may not be connected to the healthcare system.

 200
women introduced to educational content addressing TNBC

Our Partnerships in Action

PAF in partnership with Sisters Working It Out and the University of Chicago Medicine launched IGNITE: A Movement Against Triple Negative Breast Cancer (TNBC) in Black Women, starting with a weekend-long event held in Chicago, IL. Internationally renowned oncology researcher, Olufunmilayo Olopade, MD, University of Chicago Medicine, was the featured keynote speaker. Events included:



FireStarters – an intimate gathering that galvanized female “influencers” to leverage their social media reach to share critical TNBC information and support resources



Triple Negative Breast Cancer: It's a Black Thing We Need to Understand – an education and resource summit for the community





Chicago Firestarter Event



TNBC Community Event Attendees grab a photo with Dr. Olopade



Operated by PAF, the SelfMade Health Network (SMHN) was awarded a new five-year cooperative agreement from the Centers for Disease Control & Prevention to build upon its infrastructure of providing training and technical assistance to National Comprehensive Cancer Control Programs (NCCCP) and State Tobacco Control Programs (NSTCP). This extended support enables SMHN to:

-  enhance NCCCP and NSTCP capacity to engage with community leaders and other sectors to develop and implement upstream approaches that impact tobacco use and cancer-related health disparities among populations with low socioeconomic characteristics
-  continue providing one-on-one technical assistance and group training to NCCCPs and NSTCPs to enhance their capacity to implement evidence-based interventions and promising practices to impact tobacco use, tobacco-related cancers, and human papillomavirus vaccination

>> Find out more at selfmadehealth.org



TNBC Community Education & Resource Summit attendees filled bags with resources



PAF was recognized by 2 community organizations, Sisters Working It Out and Sisters Network-Chicago Chapter, for its commitment to equity.

2023 SelfMade Health Network Highlights

 60

hours of one-on-one technical assistance and group training to NCCCPs and NSTCPs successfully delivered

 1st

disparities-focused network to have content approved by CDC for continuing education (CEU) credits for physicians, nurses, and other public health professionals:

Examining the Intersection of Cancer Disparities Among Populations with Low Socioeconomic Status (SES) Characteristics

>> tceols.cdc.gov/Course/Detail2/9100

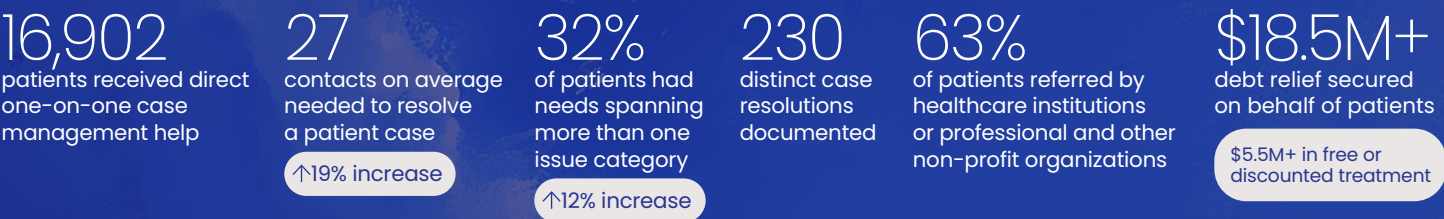
TCEO
TRAINING AND CONTINUING
EDUCATION ONLINE



PAF joined forces with SisterLove to host She Wears a Crown, an event held at the Atlanta Botanical Garden. It sought to raise awareness of the impact of TNBC on Black women and welcomed nearly 100 guests.

MORE THAN JUST NUMBERS

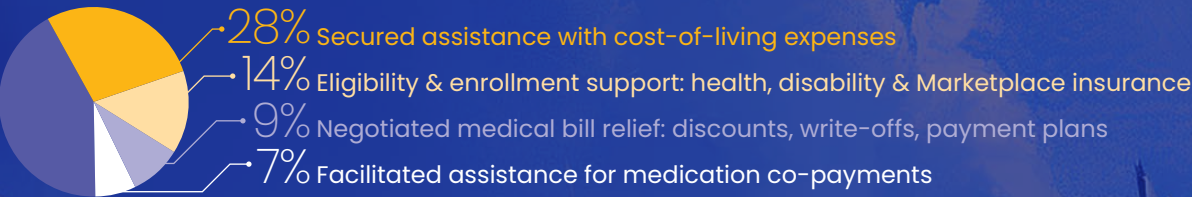
Our 2023 Case Management Impact



Why Patients Sought PAF’s Help

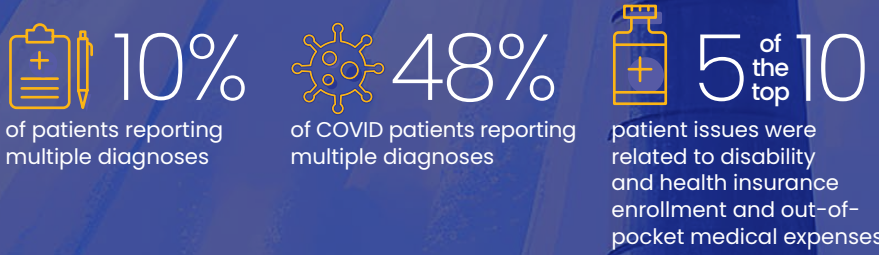
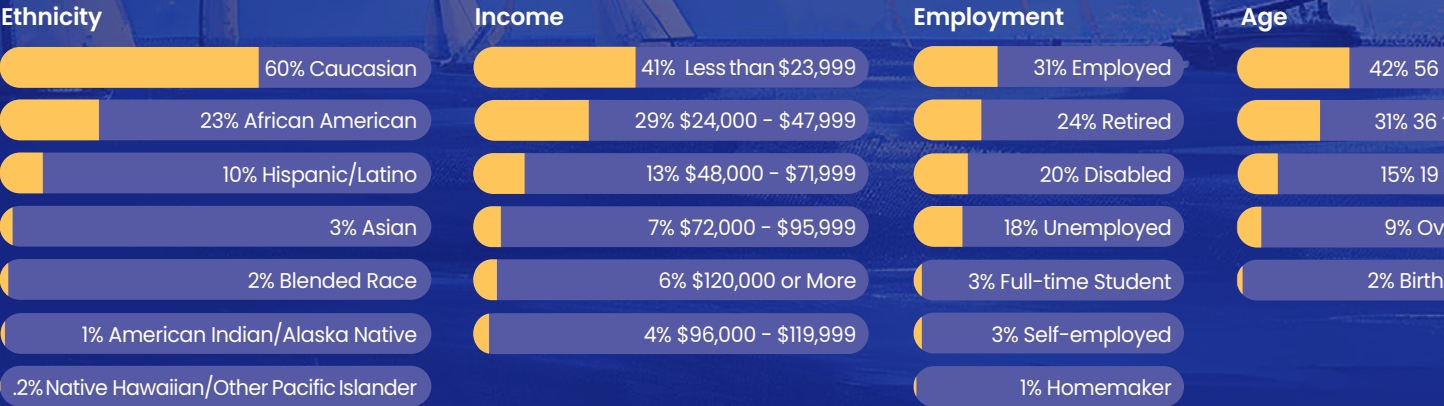
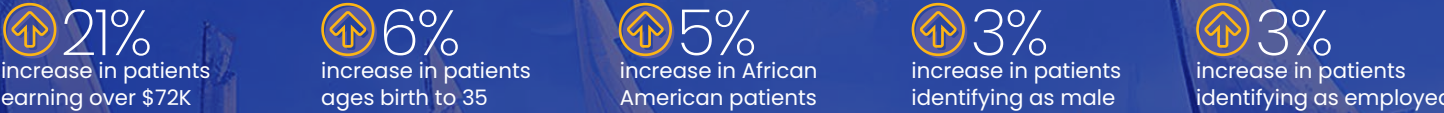


Top Ways We Helped Patients (of the 230 distinct resolutions captured)



Our Patient Population

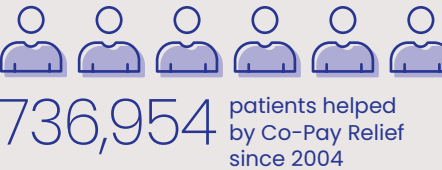
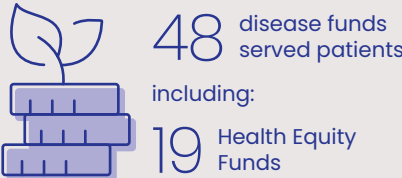
What changed in 2023?



Top 10 Distinct Diagnoses		Top 10 Diagnosis Categories	
Breast Cancer	22%	Cancers	67%
Prostate Cancer	12%	Chronic or Debilitating Conditions	10%
ALS (Lou Gehrig’s Disease)	3%	Nervous System Conditions	6%
Multiple Myeloma	3%	Cardiovascular Conditions	6%
Diabetes Type II	2%	Autoimmune Diseases	4%
Pancreatic Cancer	2%	Pulmonary Conditions	4%
Stroke (CVA)	2%	Diabetes	3%
Colon Cancer	2%	Neuromuscular Diseases	3%
Ovarian Cancer	2%	Vascular Diseases	3%
Non-Small Cell Lung Cancer	2%	Gastrointestinal and Hepatology Diseases	2%



Service by the Numbers



MORE PATIENT INSIGHT TO DRIVE CHANGE

The healthcare landscape has undergone major shifts in recent years, marked by changing regulations, integration of equitable care models, and a growing demand for affordable, accessible, and high-quality care. Patients continue to struggle with costs associated with care, treatment, and cost-of-living amplified by inflation. In 2023, our research, evaluation, and engagement work explored these topics to provide patient-generated insights and evidence. This work aligns with our goal of informing and accelerating systems change to improve patient lives and outcomes.

Survey Project: Return to Cancer Care in a Post COVID Environment

For people living with (and receiving treatment for) cancer, pandemic conditions presented additional hurdles, including disrupted personal contact with care providers, interrupted access to clinical trials, distanced therapeutic encounters, multiple immune vulnerabilities, and new forms of financial precarity. In 2023, we surveyed 2,801 PAF patients who reported a cancer diagnosis prior to March 2020.

Survey respondents (n = 430) were mostly female (77%); non-white (25%); aged >55 years (71%); with <4-year degree (58%); annual income <\$48,000 (61%); employed (26%); and living in a rural location (19%). Common cancer diagnoses reported were breast (45%); myeloma (25%); prostate (5%), and colorectal (4%). Only a small subset of our survey population (n = 36; 8%) reported not seeking cancer care in the past 12 months; cost (57%) was the most common reason for avoiding care.

>> tiny.cc/delayed-cancer-care

Reasons for not seeking care

64% reported it was their choice not to seek cancer care in the past 12 months

30% did not want to know their cancer diagnosis status

Why?

57% Cost

29% Treatment Side Effects

29% Exposure to COVID-19 Infection

Qualitative Research Project: Words Matter in Clinical Encounters

Lack of patient engagement around the content and approach to care conversations related to social determinants of health (SDOH) can negatively impact healthcare experiences and exacerbate disparities. To better understand patient perspectives of language and approaches commonly used in SDOH screenings, we conducted surveys, focus groups, and virtual workshops focused on stigmatizing language and terms.

Focus group participants were recruited from insured patients served by PAF representing various medical diagnoses, were racially/ethnically reflective of the population, and experienced some level of healthcare access and/or affordability challenges. A key lesson that emerged was the importance of integrating all aspects of SDOH screening into existing practices without creating a perception that it is something “special” or “additional.”

>> tiny.cc/clinical-encounters

Tips for a successful SDOH screening process

- ☐ Proper Follow-up
- ☐ Trained & Empathetic Staff
- ☐ Privacy Protection
- ☐ Open Communication
- ☐ Tailored Assistance



Patient Insight Institute Partnership Spotlight: AHIP Health Equity Measure Project

Health equity is a cornerstone of positive health outcomes, yet little is known about patient preferences when they are seeking an equitable care experience. Our research sought to address these gaps by conducting a survey to capture patients’ perspectives of environmental and provider factors, along with patient experiences and needs. A recurring theme among survey respondents was the cruciality of skilled communication, a desire for trust and relationship building, and a need to assess respect as a proxy for equitable care.



Publication Spotlight: A Nationwide Cross-Sectional Study on the Association of Patient-Level Factors with Financial Anxiety in the Context of Chronic Medical Conditions

Patient-level characteristics associated with the prevalence and severity of financial anxiety have yet to be described. We posit that the relationship between patients’ perceptions and their emotional reactions to their financial difficulty may be differentially driven by socioeconomic factors. Results indicate that patients who are young, female, unmarried, and representing vulnerable sub-populations (i.e., minority groups, uninsured, unemployed, low educational attainment, and low-income levels) are at elevated risk for financial anxiety.

>> go.nature.com/4cvDrwD



Engagement Spotlight

Providing a thoughtful space for patients and community members to share insights and experiences with healthcare researchers and program developers as they start new initiatives. Patients and caregivers in Massachusetts are collaborating with researchers to ensure that research and programs are focused on what is most important to patients by sharing their own lived experiences and the broader perspectives of the communities to which they are closest.

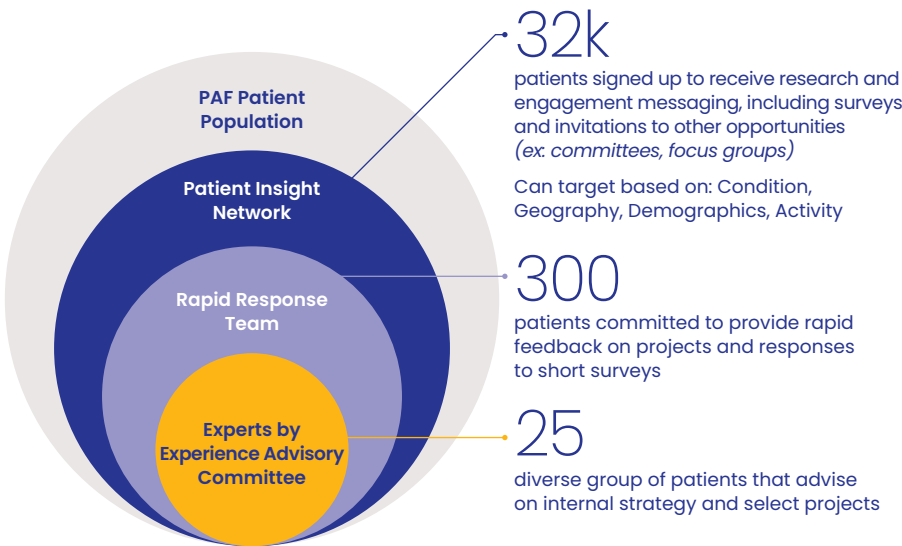
>> patientinsightinstitute.org/mpcbrb



Engagement Network

Collecting patient perspectives is one of the unique aspects of our work. To facilitate a variety of engagement activities, we have created distinct subsets of patients that we rely on for feedback for our projects and partnerships.

>> To learn more about our engagement work visit patientinsightinstitute.org/yearinreview



MORE SUPPORT OPPORTUNITIES



PAF’s 2023 Patient Insight Congress workshops were held in October with 150 patients, caregivers, researchers, and advocates from across the country attending the virtual event. Participants learned practical skills for patient engagement and community outreach and collaborated to develop a new resource to help researchers tailor their findings to patients and other lay audiences. Event workshops laid a foundation for the in-person conference taking place in Atlanta, Georgia, in the spring of 2024.

A Promise of Hope Affair

Our annual fundraising gala, A Promise of Hope Affair, was held at the Newport News Marriott at City Center and guests from near and far enjoyed the disco fever theme. The event raised \$129,350 in support of patients served through PAF case management programs and \$86,890 in support of PAF’s Scholarship for Survivors program. Speakers included scholarship recipients Alexa Chronister and Amani Phillips.

>> Watch Amani’s courageous story vimeo.com/873738616

 280 guests

 19 event sponsors

 \$216,240 raised



PAF Founder and Chair Emerita Nancy Davenport-Ennis with Promise of Hope guest speakers Alexa Chronister and Amani Phillips.



PAF staff and POH guests came in costume for the themed event.



Fundraising Event Champion

We extend thanks to the Mustang Owners Club of Southeastern Michigan (MOCSEM) and recognize them as PAF’s 2023 Fundraising Event Champion. The group generously donated \$1,000 to PAF in honor of Lauren Parrott. Additionally, they contributed \$750 to PAF in 2022.

Founded in 1975, MOCSEM is a group of enthusiasts who have a passion for all things Mustang. The Club hosts several events throughout the year in support of local and national charities.

>> Learn how you can host a PAF fundraising event at tiny.cc/paf-champion



Since 2000, our Scholarship for Survivors (SFS) program has supported college students whose educational pursuits were disrupted due to chronic or life-threatening illnesses, providing 195 students with scholarship awards totaling over \$1 million. PAF, along with many other generous donors, has enabled 61 courageous young adults to fully realize degreed graduation. This academic year, 11 new students and 29 returning students received a \$3,000 scholarship and are eligible for consecutive years of funding.

>> patientadvocate.org/connect-with-services/apply-for-a-scholarship

Congratulations to the ‘23 –’24 Scholarship Winners

- Ashleigh**
University of Texas at Austin
- Hannah**
San Diego State University
- Caroline**
FIU Herbert Wertheim College of Medicine
- Kalei**
Brigham Young University, Provo
- Casey**
University of Southern California
- Lola**
Drexel University
- Chloe**
Queens University of Charlotte
- Nicholas**
University of Wisconsin, Milwaukee
- Claire**
College of Wooster
- Terje’**
Brigham Young University, Idaho
- Daniel**
University of Maryland, College Park



Living with a rare disease inspired Lauren to pursue a career in medicine, with financial help from a PAF scholarship



>> vimeo.com/804451709

▶ Learn more about the 2023–2024 scholarship recipients
>> tiny.cc/2023-sfs



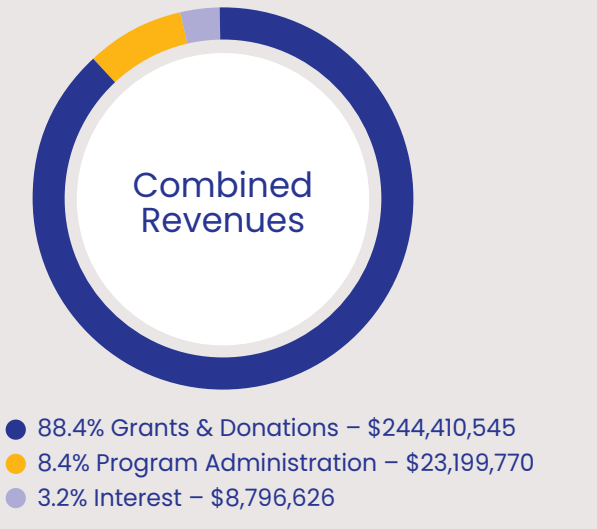
“Aloha! My name is Kalei Okalani Lyn Pollock, and I am from Oahu, Hawaii ... I was diagnosed with type 1 diabetes at seven years old. Over the years, I have learned, grown, and thrived with my disease. I took my trial and decided to make the best of it. I recently graduated from high school and am attending college this fall to study nursing. Then continuing my education to become a nurse practitioner, focusing on pediatric endocrinology ... I want to help kids like me, relate to them, and understand what they are going through personally. Having a disease that needs constant attention 24/7 is something you do not want anyone to ever go through. If I can make these kids feel a little bit more normal and show them that they can do hard things, I will do just that.”

– Kalei, Scholarship Recipient

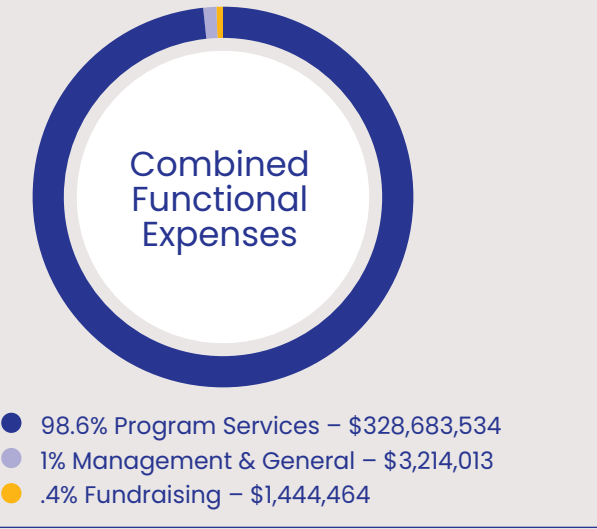
FINANCIAL STATEMENTS

Patient Advocate Foundation financial statements are based on its fiscal year, from July 1, 2022, to June 30, 2023.

Patient Advocate Foundation Statement of Financial Position June 30, 2023	
Assets	
Current Assets	
General operating cash and cash equivalents	\$ 39,923,118
Restricted cash and cash equivalents	232,635,422
Investments	52,224,088
Other Current Assets	8,711,685
Total current assets	\$ 333,494,313
Property and Equipment, net	5,476,000
Right-Of-Use Assets – Operating Lease	6,124,040
Other Assets	50,331
Total assets	\$ 345,144,684
Liabilities & Net Assets	
Current Liabilities	
Accounts payable and accrued expenses	\$ 4,822,335
Deferred revenue	19,262,923
Other Current Liabilities	1,186,362
Total current liabilities	\$ 25,271,620
Long-Term Liabilities	
Post-retirement benefits liability, less current portion	\$ 2,156,686
Incurring but not recorded liabilities	168,495
Operating lease liability, less current portion	5,754,922
Total long-term liabilities	\$ 8,080,103
Total liabilities	\$ 33,351,723
Net Assets Without Donor Restrictions	
Undesignated	\$ 26,650,151
Board designated	7,224,088
Total net assets without donor restrictions	33,874,239
Net Assets With Donor Restrictions	
	277,918,722
Total net assets	311,792,961
TOTAL LIABILITIES & NET ASSETS	\$345,144,684



TOTAL \$276,406,941



TOTAL \$333,342,011

Patient Advocate Foundation Statement of Activities Year Ended June 30, 2023			
Operating Revenues	Without donor restrictions	With donor restrictions	Total
Contributions:			
Grants & donations	\$5,355,593	\$239,054,952	\$244,410,545
Program administration	23,199,770	–	23,199,770
Investment return, net	8,796,626	–	8,796,626
Net assets released from restrictions:			
Satisfaction of program restrictions	304,982,072	(304,982,072)	–
Total revenues, gains & other support	342,334,061	(65,927,120)	276,406,941
Operating Expenses			
Program services:			
Program & Patient Services	328,683,534	–	328,683,534
Supporting services:			
Management & general	3,214,013	–	3,214,013
Fundraising	1,444,464	–	1,444,464
Total expenses	333,342,011	–	333,342,011
Change in net assets from operations	8,992,050	(65,927,120)	(56,935,070)
Other Non-operating Changes			
Post-retirement benefit changes other than periodic cost	(45,989)	–	(45,989)
Change in net assets	8,946,061	(65,927,120)	(56,981,059)
Net assets, beginning of year	24,928,178	343,845,842	368,774,020
Net assets, end of year	\$33,874,239	\$277,918,722	\$311,792,961

MORE THAN THANKFUL

Cheris Abbott-Holder	BJ’s Wholesale Club	Charities Aid Foundation of America	Nancy Dixon Cantrell and P. Thomas Cantrell	Rick and Teresa Funderburke	Roshaunda Hicks	Roxane Jones	Karina Malave-Colon
AcademyHealth	Marcy Blanchard	Dakota Chase	Daniel and Amy Dolewski	Kathleen Gallagher	High Pines Foundation	Scott Jorgensen	Janine Maness
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Tom and Stacy Zidron
Michael Zincone
Rebecca Zuch



The Co-Pay grant helps a lot with affording medical insurance premiums, and the expensive copay amounts for injections. I've been really worried about how I would manage if a grant did not become available again. It gives me peace of mind... I so appreciate having the help. Thank you!"



-Rita, Multiple Myeloma

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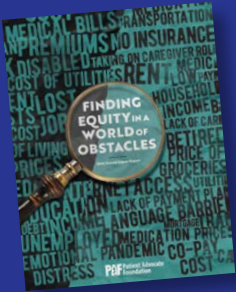
My case manager offered a variety of resources and lots of helpful education and tips. She went above and beyond ... calling all the companies I had pending balances and invoices with. She was able to help me get applications for financial assistance and in one case to lower my monthly payments!

She was so understanding and patient with me. What really blew my mind was that she logged all this activity and sent me a summary of all the companies we called and even emailed me attachments of the [financial assistance] applications... What a stress reliever because I have chemo brain and would have forgotten what we talked about.

She is truly an angel in the form of a human!”



– Esmeralda, Colon Cancer



Patient Advocate Foundation's Annual Impact Report, Finding Equity in A World of Obstacles, earned a 2023 Summit International Silver Award and a 2023 Gold Aster Award for outstanding excellence in communications and marketing.



Acknowledgments

- Editor in Chief**
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- Principal Writer & Senior Editor**
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Our Mission

Patient Advocate Foundation (PAF) is a national 501(c)3 non-profit organization, which provides case management services and financial aid to patients with chronic, life-threatening and debilitating illnesses.

Equity Value Statement

Equity moves us forward, calling us to address the legacy of deeply established societal inequities in healthcare and workplace systems. We identify and eliminate barriers to equitable access in the healthcare systems that our patients utilize and in the workplace our staff experience. We commit to diversity and inclusion strategies that enable equitable outcomes in our leadership, practices, policies, operations, and organizational systems because doing so strengthens our ability to deliver on our mission.



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PATIENT ADVOCATE FOUNDATION

STATEMENTS OF ACTIVITIES
Years Ended June 30, 2023 and 2022

	2023			2022		
	Without Donor Restrictions	With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	Total
OPERATING REVENUES						
Contributions:						
Grants	\$ 4,829,926	\$ 239,035,800	\$ 243,865,726	\$ 4,823,132	\$ 262,901,104	\$ 267,724,236
Private and public donations	250,186	-	250,186	208,487	-	208,487
Donated services (Note 14)	16,150	-	16,150	-	9,720	9,720
Donated materials (Note 14)	-	19,152	19,152	-	31,956	31,956
Program administration	23,199,770	-	23,199,770	22,628,541	-	22,628,541
Patient Congress	46,141	-	46,141	30,000	-	30,000
Promise of Hope	138,190	-	138,190	185,649	-	185,649
Patient Action Council	75,000	-	75,000	100,000	-	100,000
Investment return, net	8,796,626	-	8,796,626	524,892	-	524,892
Net assets released from restrictions:						
Satisfaction of program restrictions (Note 11)	304,982,072	(304,982,072)	-	265,742,296	(265,742,296)	-
Total revenues, gains and other support	<u>342,334,061</u>	<u>(65,927,120)</u>	<u>276,406,941</u>	<u>294,242,997</u>	<u>(2,799,516)</u>	<u>291,443,481</u>
OPERATING EXPENSES						
Program services:						
Patient/educational services	7,441,926	-	7,441,926	6,338,536	-	6,338,536
Financial aid programs	312,844,794	-	312,844,794	272,403,240	-	272,403,240
Service contracts	8,396,814	-	8,396,814	7,457,053	-	7,457,053
Supporting services:						
Management and general	3,214,013	-	3,214,013	2,739,722	-	2,739,722
Fundraising	1,444,464	-	1,444,464	1,303,792	-	1,303,792
Total expenses	<u>333,342,011</u>	<u>-</u>	<u>333,342,011</u>	<u>290,242,343</u>	<u>-</u>	<u>290,242,343</u>
Change in net assets from operations	8,992,050	(65,927,120)	(56,935,070)	4,000,654	(2,799,516)	1,201,138
OTHER NONOPERATING CHANGES						
Postretirement benefit changes other than periodic cost (Note 13)	(45,989)	-	(45,989)	(120,500)	-	(120,500)
Change in net assets	8,946,061	(65,927,120)	(56,981,059)	3,880,154	(2,799,516)	1,080,638
Net assets, beginning of year	<u>24,928,178</u>	<u>343,845,842</u>	<u>368,774,020</u>	<u>21,048,024</u>	<u>346,645,358</u>	<u>367,693,382</u>
Net assets, end of year	<u><u>\$ 33,874,239</u></u>	<u><u>\$ 277,918,722</u></u>	<u><u>\$ 311,792,961</u></u>	<u><u>\$ 24,928,178</u></u>	<u><u>\$ 343,845,842</u></u>	<u><u>\$ 368,774,020</u></u>

The Notes to Financial Statements are an integral part of these statements.