GUIDING PATIENTS TO BETTER OUTCOMES

2019 ANNUAL IMPACT REPORT
**OUR MISSION**

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

**OUR HISTORY**

PAF was founded in 1996 by Nancy Davenport-Ennis and 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 2019, and we’ve helped a cumulative total of more than 1.3 million patients nationwide with support provided by more than 200 staff.
**CONTENTS**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter from the CEO</td>
<td>4</td>
</tr>
<tr>
<td>Overall Foundation Impact</td>
<td>5</td>
</tr>
<tr>
<td>How We Help</td>
<td>7</td>
</tr>
<tr>
<td>Justin’s Story</td>
<td>8</td>
</tr>
<tr>
<td>Arthur’s Story</td>
<td>14</td>
</tr>
<tr>
<td>Tameka’s Story</td>
<td>18</td>
</tr>
<tr>
<td>Health Services, Research, Patient Experience &amp; Evaluation</td>
<td>20</td>
</tr>
<tr>
<td>Special Events</td>
<td>22</td>
</tr>
<tr>
<td>Financial Statements</td>
<td>25</td>
</tr>
<tr>
<td>Supporters</td>
<td>29</td>
</tr>
<tr>
<td>Board of Directors</td>
<td>33</td>
</tr>
<tr>
<td>Scientific Advisory Committee &amp; Honorary Board</td>
<td>34</td>
</tr>
</tbody>
</table>
Welcome

Since Patient Advocate Foundation (PAF) opened in 1996, we have directly assisted more than 1.3 million patients. We’ve learned plenty along the way, and we’ve taken those lessons and applied them to the broad array of programs and support initiatives PAF offers.

The patients we serve across all fifty states differ by age, ethnicity, disease condition, insurance status and access issues. However, they also have two very important characteristics in common: they want to get well, and they don’t want to be financially devastated while doing so.

Some patients suffer tremendous financial consequences as a result of illness while others begin their journey already disadvantaged by their pre-existing socio-economic circumstances. Whatever the case, we know that the unique needs of vulnerable, low-income patients can be addressed with navigation to critical resources like food, housing, utilities and transportation.

We are reminded every day how much more there is to uncover about what it means to be a financially compromised patient in the world’s most expensive and complicated healthcare system. What is the best place and time to uncover the issues patients face in their struggles to gain access to affordable, high-quality healthcare? Who can discover those needs, and how? What are the interventions needed to provide help efficiently while leading to the best possible health outcomes?

Our growth this year includes not only new programs designed to address specific needs experienced by the patients who come to us for help, but also research, evaluation and reporting initiatives to advance the science of patient navigation for vulnerable populations. As reflected in this report, we are committed to sharing what we learn so that others who also endeavor to help people overcome social determinants of health and other obstacles to care can benefit as well.

At PAF, our passion is to design, implement, and evaluate direct patient services that improve health equity including patient navigation, direct financial assistance, and patient education and empowerment. Our mission is to improve the lives of the patients we serve in ways that have meaningful and lasting impact.

None of this would be possible without you – the donors who champion our commitment to the mission through your generous support. It is an honor to say thank you on behalf of the patients whose stories and data are represented on the pages of this report.

Alan J. Balch, PhD
Chief Executive Officer
## Overall Foundation Impact

### Summary of PAF Total Patient Cases and Contacts in 2019

<table>
<thead>
<tr>
<th>Case Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Patient Case Count</td>
<td>145,815</td>
</tr>
<tr>
<td>Case Management Cases</td>
<td>23,702</td>
</tr>
<tr>
<td>Co-Pay Relief Cases</td>
<td>73,007</td>
</tr>
<tr>
<td>Financial Aid Fund Cases</td>
<td>42,124</td>
</tr>
<tr>
<td>Patient Services Email Helpline Sessions</td>
<td>6,982</td>
</tr>
</tbody>
</table>

### Total Patients Served by PAF Between 1996 and 2019

- **619** distinct patient diagnoses increased by 6% over 2018
- **238** distinct rare diseases increased by 7% over 2018

### The Programs Through Which We Deliver Direct Assistance

#### Case Management

- **27** total unique programs
  - 15 serve patients living with non-cancer diagnosis
  - 12 serve patients living with cancer

#### Financial Services

- **11** total unique programs serving patients through many different disease-specific funds
  - 50 open disease funds serve patients
  - 19 funds serve patients living with non-cancer diagnosis
  - 31 funds serve patients living with a cancer diagnosis
  - 4 programs are fully administered by PAF for other non-profit organizations

### What Our Patients Are Saying...

Patient satisfaction rates were high across all patient programming. Patients and their caregivers felt PAF was helpful, knowledgeable, compassionate and well-informed on issues of importance to them.

### Overall Satisfaction Rating (All PAF Programs)

- **8.97/10**

### Patient Ratings for PAF Service

- **4.74/5** Knowledge of Staff
- **4.74/5** Professionalism of Staff

### % of Respondents That Would Recommend PAF to Others by Program

- **95%** indicated their issues were resolved and/or PAF provided valuable help
- **96%** would recommend PAF to others
Service to All 50 States

PAF served patients in all 50 states and the U.S. territories in 2019. We also engaged in a variety of outreach, education, speaking engagements and event participation across the country. Using county-based data, the map below represents the locations of patients we served and provides insight into specific locations of our on-the-ground activities.

Part of the map is shaded by county to depict the number of patients served by PAF in that county while each chip represents a specific location where PAF was engaged through various activities.
Case Management

At the heart of our mission is the delivery of effective, compassionate case management interventions to patients who have been diagnosed with a chronic, life-threatening and/or debilitating illness. Through PAF’s extensive experience serving patients through case management, more than 24,000 in 2019, we recognize the critical importance of providing sustained assistance to patients wherever they are in their treatment journey today. Many vulnerable and low-income patients need intensive case management assistance at times of personal and financial crises in order to help them achieve their goals of care, improve their health outcomes, adhere to therapy or avoid insolvency.

One-on-one case management is particularly important for disadvantaged patient populations, including disabled, rural, low literacy, low SES patients, and racial and ethnic minorities. Of case management patients, 23% report being disabled, 48% earn $23,999 or less annually, and 38% are non-Caucasian, with 19% identifying as African American and 12% as Hispanic/Latino.

PAF case managers also seek to mitigate the negative effects out-of-pocket healthcare and cost-of-living expenses have on patients and their families by facilitating access to safety net programs, negotiating resolutions to medical debt and educating individuals on relevant resources. In 2019, these efforts resulted in $24,228,692 in debt relief obtained on behalf of patients.

Of the 27 programs offered through the case management division, 9 were new, including the Sickle Call CareLine, ALS Medicare Resource Line, Migraine Matters Case Management and the Personalized Medicine CareLine.

The majority of patients and caregivers who reach out to PAF’s case managers do so at the recommendation of other disease-specific patient advocacy groups. In fact, PAF had formal collaborative agreements with ten different non-profit charities in 2019 and for two of those PAF served, and continues to serve, as the administrator of their navigation services.

23% OF CASE MANAGEMENT PATIENTS report being disabled

48% OF CASE MANAGEMENT PATIENTS earn $23,999 or less annually

$24M+ IN DEBT RELIEF obtained on behalf of patients

PAFatwork.org/costofcare
Justin | Colorectal Cancer

“...I was facing loss of insurance as well as high medical bills. As a family we didn’t know the best way to manage the bills that were coming in and how the appeal system worked when a service was denied. When I called [PAF], I was only expecting someone to help me by telling me what direction to go. What I got was extraordinary service, compassion, understanding and support. [My case manager] began working on my case immediately. She included me in the phone calls with the hospital accounts payable and [my insurer]. Cancer is a horrible diagnosis and the financial and personal consequences are unbelievable. There are no words to express how grateful we are to PAF and especially to my case manager.”

APPLICABLE RESOURCES & PROGRAMS:

PAF case management interventions are frequently sought out by patients experiencing complex healthcare barriers that are often exacerbated by other factors, including urgent clinical necessity, access to specialized care available only in select locations and the need to facilitate expedient collaboration between multiple stakeholders in order to reach resolution.

23% CASE MANAGEMENT CASES involved 3 or more individual issues

• These cases required an average of 21 case management activities to resolve

9% CASE MANAGEMENT CASES involved 4 or more individual issues

• These cases required an average of 23 case management activities to resolve

PAF operates numerous case management programs to address the needs of specific diseases.

patientadvocate.org/connect-with-services/case-management-services-and-medcarelines/
While PAF case managers do not provide direct financial assistance to callers, their efforts result in financial relief to the patients they serve. This financial impact is measured by the assistance acquired and/or the costs offset by helping callers navigate the medical and insurance systems and connecting callers to appropriate resources.

**Financial Impact**

<table>
<thead>
<tr>
<th>28% Medical Cost Assistance</th>
<th>$6,574</th>
<th>Average amount recovered through case management interventions for patients who had an issue associated with debt relief</th>
</tr>
</thead>
<tbody>
<tr>
<td>32% Insurance Optimization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40% Non-Medical Assistance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**2019 Data Points:**

Top 3 Case Management Issue Categories:

- **46%** Insurance Issues
- **29%** Debt Crisis/Cost of Living
- **11%** Uninsured Issues

Average amount of financial relief provided by case management $989 per case

**When PAF Patients Were Asked...**

33% of patients stated that changes to their employment status led to a loss or “break” in their insurance coverage.

55% of patients indicated their level of financial stress was “overwhelming” or “above average”.

32% of patients stated that out-of-pocket costs for different treatment options were a major factor in treatment decision.
CO-PAY RELIEF

PAF’s Co-Pay Relief (CPR) program exists to help reduce the financial distress low-income patients and their families experience when faced with various costs. The program provides direct financial assistance to qualified patients with co-payments, co-insurance or cost-sharing through funds dedicated to specific disease states. Launched in 2004, CPR operates in compliance with the guidance provided by the Office of Inspector General (OIG) while delivering best-in-class service.

More than 73,000 patients were approved for assistance in 2019 and served through a total of 38 open disease funds, with grant payments totaling $215,132,046. PAF knows from decades of experience that low-income patients require extra financial help when it comes to paying for the numerous out-of-pocket costs associated with various diseases.

Financial Services

FINANCIAL ASSISTANCE FUNDS

PAF’s financial aid funds award small grants to eligible low-income patients to provide for a broad range of practical support needs that can impede a patient’s ability to achieve goals of care. These programs are designed to reduce the burden of certain non-medical expenses, including transportation, housing, short-term lodging, utilities and nutritional needs.

PAF also partners with other non-profit organizations to manage the administration of their financial assistance programs. In 2019, PAF’s financial aid specialists helped more than 42,000 patients, processed more than 175,000 individual grant payments and distributed a total of $67,338,103 to patients in need.

9 of 10 PAF patients report that medical costs affect their ability to access and/or adhere to recommended treatment.

Financial Services

$215M+
CPR grant payments to patients in need

PAF also partners with other non-profit organizations to manage the administration of their financial assistance programs. In 2019, PAF’s financial aid specialists helped more than 42,000 patients, processed more than 175,000 individual grant payments and distributed a total of $67,338,103 to patients in need.

42,000 patients served through all financial assistance funds

SMALL GRANTS REDUCE BURDEN OF

- Transportation
- Housing
- Short-term Lodging
- Utilities & Nutritional Needs
Patient Education & Empowerment

Extending the impact of PAF’s one-on-one services, our education and empowerment initiatives deliver actionable guidance and expert advice on practical healthcare issues in a variety of formats. The portfolio offers relevant healthcare information and education for all audiences, including patients, caregivers, healthcare professionals and those that are currently healthy.

PAF released 29 new educational content pieces in Spanish and English, distributed 54,747 PAF publications and achieved a 9% increase in total searches completed by users of the National Financial Resource Directory over 2018. patientadvocate.org/explore-our-resources/national-financial-resource-directory/

More than 20 expert webcasts are available through PAF’s on-demand Patient Empowerment Series with new titles including Disability Benefits, Preparing for Open Enrollment and Medicare Open Enrollment Basics. patientadvocate.org/explore-our-resources/webcasts/

“"I can take what I learned today and share with others who might be interested in exploring a clinical trial.” – Ann

PAF’s online subscriber community grew by 19%, with more than 3,400 members by the end of 2019 and engagement rates increasing by 13% over 2018. Community subscribers can choose to receive timely updates from three topic areas: PAF and CPR news, resources and disease-specific information and/or public health news. patientadvocate.org/get-involved/sign-up/

> Continued on Pg. 12
Working alongside advocates and medical experts from Migraine, Headache and Neurology fields to identify the topics and resources needed most, PAF developed Migraine Matters, an online educational resource tool designed to serve patients with headache and migraine disorders. This resource received almost 30,000 page views in 2019. 
migrainematters.patientadvocate.org/

“There is no greater honor than to meet a patient during the toughest point in their life, and know that my work on their behalf eased their burden and lifted roadblocks that felt insurmountable before we connected.”
– Courtney Jones
Senior Director of Case Management

Created by combining the best resources from top nonprofits and clinical experts in the field of cardiovascular treatment and research, Matters of the Heart is a self-directed online education tool that features an ever-expanding collection of articles, videos, webinars and infographics, resource directory and guided chatbot designed to provide relevant information to those seeking assistance or education on the unique challenges associated with cardiovascular diagnoses.
patientadvocate.org/matters-of-the-heart/

Matters of the Heart 2019 Utilization Statistics

<table>
<thead>
<tr>
<th>Increase</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>521%</td>
<td></td>
<td>in page visits from 2018 to 2019</td>
</tr>
<tr>
<td>4.32</td>
<td></td>
<td>average session time on site</td>
</tr>
<tr>
<td>301%</td>
<td></td>
<td>in number of visitors to the site from 2018 to 2019</td>
</tr>
<tr>
<td>236%</td>
<td></td>
<td>in unique users from 2018 to 2019</td>
</tr>
</tbody>
</table>
Health Equity & Community Engagement

PAF’s health equity work is uniquely designed to reach people where they live, work, play and pray. We meet people in communities, within worksites, and other venues that are most comfortable and most convenient for them. These efforts include community engagement and outreach initiatives and the SelfMade Health Network, a national network supported by the CDC Office on Smoking and Health and Division of Cancer Prevention and Control.

From convening community conversations on breast cancer on Chicago’s southside to facilitating partnerships between health systems and small businesses to reduce late stage breast cancer diagnosis in Memphis, and making the “business case” for lung cancer screening in West Virginia, PAF’s health equity work across the country links limited resource and vulnerable communities to a variety of services that support and assist them.

PAF Health Equity Staff Accomplishments

- Participated in 12 outreach events reaching over 2,500 patients, community navigators, caregivers and advocates
- Facilitated 2 strategic community conversations on cancer
- Convened 3 community focus groups on health insurance literacy
- Contributions made by members of PAF’s SelfMade Health Network (SMHN) were published in the Journal of Women’s Health, titled, Using Inside Knowledge Campaign Materials to Improve Gynecologic Cancer Knowledge in Underserved Women.
- Educated healthcare providers serving populations with low socio-economic status on the HPV vaccinations in partnership with the National Area Health Education Center Organization
“Haven’t had the surgery yet, but many trips to doctors and testing to get my heart ready for surgery... gas and finding rides to and back to see my doctors has been a heavy burden and stressful. Money is so tight it does have an impact on my health. I do have insurance to cover my medical bills, it’s just hard to come up with fuel money and pay someone to take us over for the 100-mile round-trip visits and testing. And motel money for when I have very early testing and night of surgery for my wife and a driver. So, the impact on our life is the financial help from PAF. Thank you.”

**APPLICABLE RESOURCES & PROGRAMS:**
Our Financial Aid Funds provide small grants to eligible patients for a broad range of support needs and **ease the burden of certain non-medical expenses**, including transportation, housing, short-term lodging, utilities and nutritional needs.

patientadvocate.org/connect-with-services/financial-aid-funds

**$600**
PAF’s Heart Valve Financial Aid Fund grant increased from $500 to help with additional expenses now covered by the grant, which includes lodging and transportation

**100%**
PATIENTS SURVEYED would recommend a PAF Financial Aid Fund to others

Case management services were added to the Matters of the Heart online tool, ensuring that patients with cardiac conditions who have needs beyond the online resource can now access a case manager for help.

cardio.patientadvocate.org
16% of patients indicated that they were “very concerned” about transportation to treatment or care during their treatment journey.

63% of patients indicated that “avoiding extreme financial distress” was a personal goal related to their care.

59% of patients stated that the help they received from PAF was “extremely helpful” in aiding them in achieving their care goals.

2019 DATA POINTS:

Patients with cardiovascular conditions seeking support from PAF increased by 6% in 2019.

Average Mileage Traveled Each Way for Treatment:
- 26MI All Case Management Cases
- 47MI Case Management Cases with a Travel Issue

Average miles traveled each way by patients with a Travel Issue increased by 28% in 2019: (47 miles in 2019 - 37 miles in 2018)
# Service by The Numbers

## Case Management

<table>
<thead>
<tr>
<th>Total Case Count</th>
<th>23,702</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Total Case Contacts</th>
<th>387,508</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>2019 Diagnoses</th>
<th>619</th>
</tr>
</thead>
</table>

## Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>19%</td>
</tr>
<tr>
<td>American Indian/Alaska Native</td>
<td>1%</td>
</tr>
<tr>
<td>Asian</td>
<td>3%</td>
</tr>
<tr>
<td>Blended Race</td>
<td>2%</td>
</tr>
<tr>
<td>Caribbean Islander</td>
<td>0.01%</td>
</tr>
<tr>
<td>Caucasian</td>
<td>62%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>12%</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>1%</td>
</tr>
<tr>
<td>Native Hawaiian/Other Pacific Islander</td>
<td>0.01%</td>
</tr>
</tbody>
</table>

## Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0 - $23,999</td>
<td>48%</td>
</tr>
<tr>
<td>$24,000 - $47,999</td>
<td>28%</td>
</tr>
<tr>
<td>$48,000 - $71,999</td>
<td>5%</td>
</tr>
<tr>
<td>$72,000 - $95,999</td>
<td>12%</td>
</tr>
<tr>
<td>$96,000 - $119,999</td>
<td>3%</td>
</tr>
<tr>
<td>$120,000 or More</td>
<td>4%</td>
</tr>
</tbody>
</table>

## Employment

<table>
<thead>
<tr>
<th>Employment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disabled</td>
<td>23%</td>
</tr>
<tr>
<td>Employed</td>
<td>27%</td>
</tr>
<tr>
<td>Full-time Student</td>
<td>2%</td>
</tr>
<tr>
<td>Homemaker</td>
<td>1%</td>
</tr>
<tr>
<td>Minor Child</td>
<td>1%</td>
</tr>
<tr>
<td>Retired</td>
<td>25%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>3%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>18%</td>
</tr>
</tbody>
</table>

## Age

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 18</td>
<td>4%</td>
</tr>
<tr>
<td>19 - 35</td>
<td>16%</td>
</tr>
<tr>
<td>36 - 55</td>
<td>28%</td>
</tr>
<tr>
<td>56 - 75</td>
<td>44%</td>
</tr>
<tr>
<td>Over 75</td>
<td>9%</td>
</tr>
</tbody>
</table>

## Insurance Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insured</td>
<td>88%</td>
</tr>
<tr>
<td>Uninsured</td>
<td>12%</td>
</tr>
</tbody>
</table>

## Top 5 Diagnosis Categories & Individual Disease Breakout

### Cancers 61%
- Breast Cancer
- Prostate Cancer
- Colorectal Cancer
- Lung Cancer
- Non-Hodgkin's Lymphoma

### Autoimmune Diseases 2%
- Rheumatoid Arthritis
- Arthritis
- Lupus
- Osteoarthritis
- Psoriatic Arthritis

### Cardiovascular Conditions 6%
- Pulmonary Hypertension
- Hypertension
- Congestive Heart Failure
- Heart Attack
- Atrial Fibrillation

### Chronic or Debilitating Conditions 10%
- HIV, AIDS
- Osteoporosis
- Crohn's Disease
- COPD (Lung Disease)
- Hepatitis B

### Nervous System Conditions 5%
- Multiple Sclerosis
- Stroke (CVA)
- Parkinson's Disease
- Epilepsy
- Migraine
TOP 5 SPECIFIC CASE MANAGEMENT ISSUES REPORTED

10% Inability to afford care - hospital/facility cost share
9% Inability to afford care - medication cost share
7% Inability to afford transportation expenses
7% Inability to afford rent/mortgage
6% Inability to afford utility/shut off notice

TOP 15 CASE MANAGEMENT RESOLUTIONS

14% Obtained financial assistance - negotiated payment plan/discount
8% Facilitated/secured free or charity for transportation assistance
7% Facilitated rental/mortgage payment relief
6% Facilitated utility/phone relief
6% Applied for financial assistance
6% Educated on general benefits & coverage
4% Guidance provided regarding disability process
3% Offset cost through alternative assistance
3% Facilitated/located food assistance
2% Enrolled into pharmaceutical indigent drug program
2% Facilitated access to care through local clinic/hospital/doctor
2% Facilitated/identified new insurance coverage
2% Facilitated application for financial assistance - premium assistance
1% Provided guidance regarding the Affordable Care Act (ACA)
1% Approved for financial assistance

TOP 10 DIAGNOSES FOR CASE MANAGEMENT

19% Breast Cancer
5% Prostate Cancer
5% Colorectal Cancer
4% Lung Cancer
3% Non-Hodgkin’s Lymphoma
2% Multiple Sclerosis
2% Leukemia
2% Multiple Myeloma
2% Testicular Cancer
2% Ovarian Cancer

Patient Advocate Foundation CO-PAY RELIEF

73,007 Patients Approved
7 Average Contacts per Case
$215,132,046 Grant Payment Totals
242,845 Incoming Calls Handled
705,540 Total # of Grant Payments

Total Patients Served by CPR Since Inception
450,421

6 NEW CPR DISEASE FUNDS LAUNCHED IN 2019

- Cystic Fibrosis
- Pulmonary Fibrosis
- Rheumatoid Arthritis
- Skin Cancer
- Ulcerative Colitis
- Uterine Cancers
PATIENT IMPACT: TAMEKA’S STORY

Tameka | Colorectal Cancer

“I would have never known about any of the programs that were available to me. There was so much information that a person not in the healthcare system wouldn’t know to look for. My case manager was amazing. She would even call sometimes just to check on me and be sure I was in good spirits. For me that meant a ton. She made so many calls and did so much searching on my behalf I felt like family to her. I’ll never forget her!”

APPLICABLE RESOURCES & PROGRAMS:

The National Financial Resource Directory is an online educational tool that provides patients with an immediate, comprehensive list of customized state, local and national resources based on their unique search criteria.

patientadvocate.org/explore-our-resources/national-financial-resource-directory/

1,125,846

RESOURCES matched to users’ needs

36,782

COMPLETED SEARCHES 9% increase over 2018

PAF launched 9 new case management programs in 2019 including the Cancer Navigation Demonstration Program, in collaboration with the Florida Alliance for Healthcare Value, that is designed to evaluate the effectiveness of proactive and reactive navigation as an intervention for cancer patients. The program measures the reduction in financial and emotional stress, time away from work and access to and utilization of employer-based benefits. PAF provides proactive benefit education and navigation to each employee and/or dependent contacting the program and delivers reactive case management services to resolve emergent access and affordability issues.
PATIENT DISTRESS LEVELS

<table>
<thead>
<tr>
<th>Before Case Management Assistance</th>
<th>50% High Distress</th>
<th>28% Moderate Distress</th>
<th>22% Low Distress</th>
</tr>
</thead>
<tbody>
<tr>
<td>After Case Management Assistance</td>
<td>23% High Distress</td>
<td>35% Moderate Distress</td>
<td>42% Low Distress</td>
</tr>
</tbody>
</table>

WHEN PAF PATIENTS WERE ASKED...

66% OF PATIENTS reported that receiving case management services from PAF reduced their stress.

92% OF PATIENTS served by PAF’s case management team would recommend our organization to others.

20% OF PATIENTS served by PAF used our online educational publications or website resources.

2019 DATA POINTS:

Average number of contacts per case management case: 16

Case management patients were younger in 2019 – 20% were 35 or younger – an increase of 15% over 2018.

Case management Gender:

63% Female
37% Male
Advancing the Science of Patient Navigation

Knowing a patient’s priorities and financial stressors while coping with a chronic, life-threatening and/or debilitating illness is not enough. We must also align the support and resources necessary to assist them in addressing their concerns and minimizing cost. While the concept of patient navigation has been recognized as an important aspect of providing quality care for some time, financial navigation has emerged as an area of heightened interest due to the impact of medical debt and material hardships on patients and families.

Data Collection Activities

To ensure that PAF’s research projects reflect what matters most to our patients, PAF conducted 2 large retrospective survey projects and 3 prospective micro surveys targeting issues or concerns that were observed in current quantitative and qualitative data from our patient population.

RETROSPECTIVE SURVEYS

Cross-sectional retrospective studies allow PAF to formulate hypotheses about possible associations between an outcome of interest and patient demographics and enable us to investigate potential relationships after help is delivered.

>6,200
PATIENTS
participated in retrospective survey projects
24% response rate

PROSPECTIVE MICRO SURVEYS

To capture patient perspectives prior to service delivery, data collection fields were embedded into Co-Pay Relief’s online portal workflow to facilitate rapid research and evaluation initiatives.

>3,250
PATIENTS
participated in micro survey projects

Research Dissemination

Dissemination is an important component of the research process, and the utilization of PAF’s research findings is an organizational priority.

7 abstracts accepted and presented at national conferences.
(5 posters, 2 oral presentations)

1 blog post

2 peer-reviewed journal articles

Published Articles in Collaboration with Research Partners

Fred Hutchinson Cancer Research Center
Pilot Feasibility Study of an Oncology Financial Navigation Program
Journal of Oncology Practice

Emory University/ECOG-ACRIN
Pilot Feasibility Study of an Oncology Financial Navigation Program in Brain Cancer Patients
American College of Radiology

ADAP AAA+
Navigating the Costs of HIV Care – Conversations, Resources & Patient Experience
Online Blog
### Key Findings from 2019 PAF Survey Projects

#### Quality of Life
- 29% of patients rate their physical health as "excellent" or "very good".
- 31% had a general distress score greater than 7 in the past 7 days (10 point scale).
- 17% had a discussion with their physician about palliative care.
- 1 in 3 were very concerned about returning to daily activities.
- 48% stated that maintaining current quality of life was a personal care goal.

#### Care Conversations
- 1 in 4 patients were “very concerned” about having enough information about treatment options.
- 65% stated doctor listened carefully to them.
- 57% shared personal goals related to care with doctor.
- 43% had complete trust in their doctor or medical provider.
- 2 in 3 stated that their doctor explained things in a way that was easy to understand.

#### Barriers to Care
- 58% said that cost of deductibles, copay or coinsurance impacted care.
- 34% said challenges with insurance coverage impacted ability to achieve care goals.
- 12% stated transportation cost as a barrier to care.
- 1 in 10 said unemployed status led them to avoid medical care after diagnosis.
- 63% experienced financial hardship due to the cost of medical care.

#### Treatment Decision Making
- 32% stated that out-of-pocket costs were a major factor when selecting a treatment option after diagnosis.
- 35% of employed patients went on paid disability due to their diagnosis or treatment.
- 1 in 2 expressed a confidence level of "10" when asked about taking an active role in making care decisions.
- 47% patients were "very concerned" about the long-term side effects of their treatment choice.
- 72% said work impact was "extremely" or "very" important to discuss when making care decisions.

#### Financial Impact
- 55% took a significant amount of time away from work for treatment.
- 1 in 5 felt an overwhelming level of financial distress.
- 15.8 average cost score of patients served by PAF in 2018 (0-44 lower score indicates greater financial toxicity).
- 3 in 4 were very concerned about the overall financial cost of treatment.
- 43% said that day-to-day living expenses were their largest unmet need.

### Research Partners

In 2019, PAF further expanded our collaborative research partnerships with other academic and non-profit organizations.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Project</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fred Hutchinson Cancer Research Center</td>
<td>Safeway Financial Navigation Program</td>
<td>Seattle, WA</td>
</tr>
<tr>
<td>LUNGevity Foundation</td>
<td>Treatment Preferences of Lung Cancer Patients and Caregivers</td>
<td>Chicago, IL</td>
</tr>
<tr>
<td>University of Alabama at Birmingham</td>
<td>Quantifying Breast Cancer Patient Preferences and their Association with Financial Toxicity during Treatment Decision-making</td>
<td>Birmingham, AL</td>
</tr>
<tr>
<td>Emory University/ECOG ACRIN Cancer Research Group</td>
<td>Measuring Outcomes of Financial Counseling in Brain Cancer Study</td>
<td>Atlanta, GA</td>
</tr>
<tr>
<td>University of North Carolina at Chapel Hill</td>
<td>Improving the Reach and Quality of Cancer Care in Rural Populations</td>
<td>Chapel Hill, NC</td>
</tr>
<tr>
<td>National Institutes of Health Center for Genomic Research</td>
<td>The Case-Manager Experience: Evaluating Underserved Populations’ Access to Genomic Medicine and Clinical Trials</td>
<td>Washington, DC</td>
</tr>
</tbody>
</table>

### Program Evaluation

PAF routinely engages in program evaluation, using this standardized tool to strengthen quality and improve outcomes. The results are used to evaluate the quality and effectiveness of our programs. Internal projects are focused on our case management population in the areas of Patient Engagement, eHealth Literacy and Employee Satisfaction and Productivity.

Data highlights from 2019 research and evaluation projects are presented throughout the report.
A Promise of Hope Affair

PAF’s premiere fundraising gala, the 18th annual A Promise of Hope Affair (POH), was held in February at the Newport News Marriott at City Center in Virginia. This event raised nearly $145,000 in support of patients served through our case management programs and $70,000 in support of students served through our Scholarship for Survivors program. This engaging event drew over 330 guests from across the nation and the local community and was supported by 25 event sponsors. Guests heard from two courageous young students supported by PAF’s Scholarship for Survivors program. They also enjoyed dinner, dancing, casino games and a live and silent auction.

To learn more about A Promise of Hope Affair, visit promiseofhope.net
Scholarship for Survivors

Over the past 20 years, the Scholarship for Survivors program has supported 113 deserving college students whose educational pursuits were disrupted due to a chronic illness through scholarship awards totaling over $640,000. PAF, along with many other gracious funders, has enabled 50 of these bright and courageous young adults to realize fully degreed graduation with 25 still pursuing their course of study. Scholarship recipients are eligible to receive $3,000 per school year for four consecutive years.

Learn more about our scholarship program
patientadvocate.org/scholarships

“... At the age of 15, I was diagnosed with osteosarcoma ... My left leg was amputated above the knee and part of my right lung was removed. At age of 17, my cancer relapsed in my right hip ... At the age of 19, my cancer relapsed in my right thigh. Now, I am in my 3rd and last year of college to complete my Diagnostic Medical Sonography degree! I was given the chance to make my dreams come true and am truly grateful to those who generously donate to the PAF Scholarship for Survivors program.”

– MeKayla | scholarship recipient
Patient Congress

In September, PAF hosted its 20th annual Patient Congress in Washington DC, an event that brings together patients, caregivers and health professionals from throughout the U.S. to network, learn and educate about what matters most to seriously ill patients. The 2019 event focused on cost of care, using stories and advocacy through several components (education, networking, and a StorySlam) to advance awareness about healthcare costs.

To experience the event, visit npaf.org/what-we-do/patient-congress-2019-full/

Breakaway from Cancer & Breakaway from Heart Disease

PAF was pleased to partner again with the Amgen Breakaway from Cancer™ (BFC), and its new component Breakaway from Heart Disease™ (BFHD), whose main event is the Amgen Tour of California, a seven-stage bike race through California. This year’s race started in Sacramento and ended in Pasadena at the Rose Bowl, with PAF manning booths at both locations and educating attendees about our services and resources. Other BFC partners included Prevent Cancer Foundation, Cancer Support Community, National Coalition for Cancer Survivorship, Susan G. Komen and the Multiple Myeloma Research Foundation.

New in 2019 was Amgen’s Breakaway Challenge, started on 4/1/19, which joined BFC and BFHD to urge participants to turn their walking, running or cycling miles into support for the non-profit advocacy partners. Amgen generously donated $1 for every Breakaway Challenge mile completed by initiative participants.

“I learned how to incorporate my story into larger healthcare conversations. I found courage and renewed hope when I shared my story and listened to others. Collectively, our stories offered a rich perspective of the deficits found within the American healthcare system ... I learned the term “patient centered care” which offered the way to communicate the “how” when having healthcare conversations ...

The isolation of caregiving melted away ...”

– Paula
Volunteer and Patient Congress participant

To experience the story, visit PAFatwork.org/caregiverToni
### SUMMARY OF TOTAL PATIENT IMPACT IN FISCAL YEAR 2018/19

<table>
<thead>
<tr>
<th>Total Patient Cases</th>
<th>139,465</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Case Management Cases</td>
<td>24,627</td>
</tr>
<tr>
<td>Total Co-Pay Relief Cases</td>
<td>75,580</td>
</tr>
<tr>
<td>Total Financial Support Programs Cases</td>
<td>33,263</td>
</tr>
<tr>
<td>Total Patient Services Email Helpline Sessions</td>
<td>5,995</td>
</tr>
<tr>
<td>Total Patient Services Case Contacts</td>
<td>1,285,948</td>
</tr>
</tbody>
</table>

### SUMMARY OF CASE MANAGEMENT IMPACT IN FISCAL YEAR 2018/19

| Total PAF Case Management Case Count | 25,525* |
| Unique Case Management Patient Issues | 44,367 |
| Total PAF Case Management Contacts | 410,954 |
| Average Contacts per Case | 16.1 |

*To ensure the greatest degree of accuracy, the case management impact data presented above is derived from closed cases.
# Patient Advocate Foundation Statements of Financial Position June 30, 2019 and 2018

## ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General operating cash and cash equivalents</td>
<td>$28,077,632</td>
<td>$24,050,994</td>
</tr>
<tr>
<td>Restricted cash and cash equivalents</td>
<td>250,800,565</td>
<td>261,254,275</td>
</tr>
<tr>
<td>Unconditional promises to give</td>
<td>17,254,062</td>
<td>30,424,481</td>
</tr>
<tr>
<td>Service contract receivable</td>
<td>538,498</td>
<td>514,231</td>
</tr>
<tr>
<td>Due from National Patient Advocate Foundation</td>
<td>18,437</td>
<td>7,373</td>
</tr>
<tr>
<td>Investments and cash equivalents</td>
<td>2,078,900</td>
<td>1,999,015</td>
</tr>
<tr>
<td>Inventories</td>
<td>42,269</td>
<td>58,570</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>412,217</td>
<td>405,146</td>
</tr>
<tr>
<td><strong>Total current assets</strong></td>
<td><strong>299,222,580</strong></td>
<td><strong>318,714,085</strong></td>
</tr>
<tr>
<td><strong>Property and equipment, net</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4,321,760</td>
<td>4,218,172</td>
</tr>
<tr>
<td><strong>Other assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refundable deposits</td>
<td>50,331</td>
<td>50,331</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>303,594,671</strong></td>
<td><strong>322,982,588</strong></td>
</tr>
</tbody>
</table>

## LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$3,763,880</td>
<td>$8,650,706</td>
</tr>
<tr>
<td>Due to National Patient Advocate Foundation</td>
<td>10,290</td>
<td>29,385</td>
</tr>
<tr>
<td>Postretirement benefits liability, current portion</td>
<td>34,233</td>
<td>-</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>16,670,044</td>
<td>18,203,925</td>
</tr>
<tr>
<td>Accrued vacation leave</td>
<td>462,147</td>
<td>318,690</td>
</tr>
<tr>
<td><strong>Total current liabilities</strong></td>
<td><strong>20,940,594</strong></td>
<td><strong>27,202,706</strong></td>
</tr>
<tr>
<td><strong>Long-term liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postretirement benefits liability, less current portion</td>
<td>3,137,549</td>
<td>2,422,014</td>
</tr>
<tr>
<td>Incurred but not recorded liabilities</td>
<td>126,804</td>
<td>92,974</td>
</tr>
<tr>
<td><strong>Total long-term liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>3,264,353</strong></td>
<td><strong>2,514,988</strong></td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>24,204,947</strong></td>
<td><strong>29,717,694</strong></td>
</tr>
<tr>
<td><strong>Net assets without donor restrictions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undesignated</td>
<td>13,272,753</td>
<td>9,557,450</td>
</tr>
<tr>
<td>Board designated</td>
<td>2,078,900</td>
<td>1,999,015</td>
</tr>
<tr>
<td><strong>Total net assets without donor restrictions</strong></td>
<td><strong>15,351,653</strong></td>
<td><strong>11,556,465</strong></td>
</tr>
<tr>
<td><strong>Net assets with donor restrictions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restricted by purpose</td>
<td>264,038,071</td>
<td>281,708,429</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>279,389,724</strong></td>
<td><strong>293,264,894</strong></td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>303,594,671</strong></td>
<td><strong>322,982,588</strong></td>
</tr>
</tbody>
</table>
## Patient Advocate Foundation Statements of Activities Years Ended June 30, 2019 and 2018

### FINANCIAL STATEMENTS

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

### OPERATING REVENUES

**2019**

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$3,759,260</td>
<td>$217,776,219</td>
<td>$221,535,479</td>
</tr>
<tr>
<td>Private and public donations</td>
<td>165,787</td>
<td>165,787</td>
<td>158,632</td>
</tr>
<tr>
<td>Donated services and materials</td>
<td>35,314</td>
<td>35,314</td>
<td>40,374</td>
</tr>
<tr>
<td>Program administration</td>
<td>16,996,013</td>
<td>16,996,013</td>
<td>19,172,394</td>
</tr>
<tr>
<td>Patient Congress</td>
<td>80,000</td>
<td>80,000</td>
<td>10,000</td>
</tr>
<tr>
<td>Promise of Hope</td>
<td>141,650</td>
<td>141,650</td>
<td>149,858</td>
</tr>
<tr>
<td>Patient Action Council</td>
<td>75,000</td>
<td>75,000</td>
<td>150,000</td>
</tr>
<tr>
<td>Investment return</td>
<td>5,559,850</td>
<td>5,559,850</td>
<td>2,919,767</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction of program restrictions</td>
<td>235,446,577</td>
<td>(235,446,577)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total revenues, gains and other support:</strong></td>
<td>262,259,451</td>
<td>(17,670,358)</td>
<td>244,589,093</td>
</tr>
</tbody>
</table>

### OPERATING EXPENSES

**2019**

<table>
<thead>
<tr>
<th>Programs services:</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient/educational services</td>
<td>5,867,102</td>
<td></td>
<td>4,931,805</td>
</tr>
<tr>
<td>Financial aid programs</td>
<td>242,788,385</td>
<td>278,416,531</td>
<td>278,416,531</td>
</tr>
<tr>
<td>Service contracts</td>
<td>5,234,955</td>
<td>5,268,447</td>
<td>5,268,447</td>
</tr>
<tr>
<td>Supporting services:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>2,746,021</td>
<td></td>
<td>2,700,616</td>
</tr>
<tr>
<td>Fundraising</td>
<td>1,138,723</td>
<td></td>
<td>1,079,528</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>257,775,186</td>
<td></td>
<td>292,396,927</td>
</tr>
</tbody>
</table>

| Change in net assets from operations                | 4,484,265                  | (13,186,093)            | 4,392,434 |

### OTHER NONOPERATING CHANGES

| Postretirement benefit charges other than periodic cost | (689,077)                   | (255,504)               |       |
| Change in net assets                                 | 3,795,188                  | (13,875,170)            | 4,136,930 |
| Net assets, beginning of year                         | 11,556,465                 | 293,264,894             | 199,912,344 |
| Net assets, end of year                              | $15,351,653                | $279,389,724            | $281,708,429 |

### 2018

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$3,138,681</td>
<td>$352,845,740</td>
<td>$355,984,421</td>
</tr>
<tr>
<td>Private and public donations</td>
<td>158,632</td>
<td></td>
<td>158,632</td>
</tr>
<tr>
<td>Donated services and materials</td>
<td>40,374</td>
<td></td>
<td>40,374</td>
</tr>
<tr>
<td>Program administration</td>
<td>19,172,394</td>
<td></td>
<td>19,172,394</td>
</tr>
<tr>
<td>Patient Congress</td>
<td>10,000</td>
<td></td>
<td>10,000</td>
</tr>
<tr>
<td>Promise of Hope</td>
<td>149,858</td>
<td></td>
<td>149,858</td>
</tr>
<tr>
<td>Patient Action Council</td>
<td>150,000</td>
<td></td>
<td>150,000</td>
</tr>
<tr>
<td>Investment return</td>
<td>2,919,767</td>
<td></td>
<td>2,919,767</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction of program restrictions</td>
<td>271,049,655</td>
<td></td>
<td>271,049,655</td>
</tr>
<tr>
<td><strong>Total revenues, gains and other support:</strong></td>
<td>244,589,093</td>
<td></td>
<td>81,796,085</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programs services:</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient/educational services</td>
<td>4,931,805</td>
<td></td>
<td>4,931,805</td>
</tr>
<tr>
<td>Financial aid programs</td>
<td>278,416,531</td>
<td></td>
<td>278,416,531</td>
</tr>
<tr>
<td>Service contracts</td>
<td>5,268,447</td>
<td></td>
<td>5,268,447</td>
</tr>
<tr>
<td>Supporting services:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>2,700,616</td>
<td></td>
<td>2,700,616</td>
</tr>
<tr>
<td>Fundraising</td>
<td>1,079,528</td>
<td></td>
<td>1,079,528</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>292,396,927</td>
<td></td>
<td>292,396,927</td>
</tr>
</tbody>
</table>

| Change in net assets from operations                | 81,796,085                 |                         | 86,188,519 |

### Net assets, beginning of year                     | 11,556,465                 |                         | 199,912,344 |

### Net assets, end of year                           | $281,708,429               |                         | $293,264,894 |
**COMBINED REVENUES**

- 91% Program Grants – $221,535,479
- 7% Program Administration – $16,996,013
- 2% Interest – $5,559,850
- 10% Gifts & Contributions – $240,787
- 9% Event Revenue – $221,650
- 1% In-Kind Service – $35,314

**TOTAL $244,589,093**

---

**COMBINED FUNCTIONAL EXPENSES**

- 98% Program Services – $253,890,442
- 1% Management & General – $2,746,021
- 44% Fundraising – $1,138,723

**TOTAL $257,775,186**
Supporters

3 Bowls of Color
AbbVie
Ace Peninsula Hardware
Adele Castillo Art, LLC
Advanced Health Media
AEG Presents LLC
Michelle Alexander
David Allen
Rebecca Allen
Allergan
Monique Allewaert
AlphaSights, Ltd
ALS Association
AmazonSmile
American Cancer Fund
American Cancer Society
American International College
Amgen
Amgen Cycling Club
Kadhambari Anbalagan
David and Caitlin Anderson
Marbrico Anderson
Carolyn Andrews
Deborah Andrus
Anna’s Italian Restaurant & Pizzeria
Anna’s Pizza of Poquoson
Diane Anuszewski
Michael and Kelly Archuleta
Arent Fox LLP
Art Unplugged
AstraZeneca
AT&T Employee Giving Campaign
Khalilah Atkinson
Shonta Atkinson-Chambers
Monica Avery
Katie Abb
Jeanine and Ken Baggett
Bakers Crust Artisan Kitchen
Charles Balch
Glen Balch
Valerie and Alan Balch
Roderick Baldwin
Yotam Barkai
Calvin and April Barker
JR and Madelyn Barley
Hugh Barlow
Luenia Barnes
Daniel Basnight
Baylor Management Company
BB&T
BB&T Benefit Consultants
Jackie Beard
Begin Again Foundation
Mandy Behrens
Javier Belgrave
Samantha Ben
Bender’s Books & Cards
Benevity Community Impact Fund, The
Richard Bennett
Bennett Farms Market & Garden Center
George Berholz and Carol Berholz
Cam Bernier
BJ’s Brewhouse Restaurant
BJ’s Wholesale Club
Kimberly Blanchard
Milton Blanks
Jeffrey and Jill Blinder
Meagan and Charlie Bocklet
Boehringer Ingelheim
Boeing Company, The
Paula Bol
Rashod Bolden
Kathy Booher
Shay R. Boyd
Nicolette Braccio
Janet Bradley
Jill Bradley
Erin Bradshaw
Brandi Ledford Beauty
Cheryl Brazie
Breakaway From Cancer
Breast Cancer Research Foundation of Alabama
Jennifer Brewster
Bristol-Myers Squibb
Samantha and Daniel Brody
Angelia Brown
Benton Brown
Brown Edwards & Company LLP
Rodney Buccat
Buda Masonic Lodge #800
Buggy Bathe Auto Wash, Lube & Detail Shoppe
Busch Gardens Williamsburg
Angela Butler
John and Terri Caldwell
Dwana Calhoun
Mary Ann Campbell
Raul Canales
Canopy Washington DC The Wharf
Captain George’s Seafood Restaurant
John Cardosa
Saundria and Alexandria Cardwood
Sharon and Leonard Carney
Cynthia Carter
John and Jeannette Carter
Jane Case
Bryan and Fran Castellow
Celgene
Centers for Disease Control and Prevention
ChangeLab Solutions
Inga Charlotte
Angie Chatterjee
Chevron
Mickey Chohany
Sakthi Chokkalingam
Christmas Store, The
Chrysler Museum of Art
Circa 1918 Kitchen and Bar
Eugene Clark
ClearVision Optometry
Steve and Kim Clore
Clothes Mentor
Coalition For Headache and Migraine Patients
Sharon W Cochran
Ethel Coggeshall
Daniel Cohen
Scott Cone and Jen Ragl
Tracy Cone
Kathleen Connelly
Carol Conrad
Amy Conti
Tim and Taylor Cook
Core Fitness Concepts
Steven Cortes
Costco Wholesale
Jacqueline Costen
County Grill, The
Chanda Cox
Joyce Crook
Gwen Darien and Jonathan Sibley
Davenport & Co
Jaccqueyn Davison
Vicki Dawson
William Dent
Device Pitstop Newport News
Jennifer Dick
Victoria Diedrichs
Josi Dillon
Dino’s Pizza Shop
Daniel and Amy Dolewski
Annelle Donaldson
Donatos
Donna Foundation, The
Dover Downs Hotel & Casino
Jennifer and Brian Dow
Andrew Dunn and Amanda Watkins
East Carolina Athletic Department
ECOG-ACRIN Medical Research Foundation, Inc
ECRI Institute
Rebecca Edmondson
Karen and Ronald Edwards
Shawn and Shannon Edwards
Edwards Lifesciences
Roland Elliott
Thomas and Elizabeth Ema
Embassy Suites by Hilton
EMD Serono
Empyrean Benefit Solutions
Enlighten Clothing
John Ennis and Nancy Davenport-Erris
Escape Room Virginia Peninsula
Cynthia and Artie Espenshade
Tracy Evans
Jeffrey L Evelhoch
Farlow Marital Trust, The
Donna and Brian Fenelon
Steve and Teana Ferguson
Ferguson Center for the Arts at Christopher Newport University
Fidelity Charitable Gift Fund
Leslie Fields
Brooke Flores
Florida Alliance for Healthcare Value
Florida Aquarium, The
Laura Fogg
David Foley
Food for Thought Restaurant
Foundation Medicine
Frankie’s of Charleston
C.C. and Glenda Frazier
Terrance Frazier
Friends of Cancer Research
Frisco RoughRiders
Gerald and Patricia Gagliardi
Gah Bua Kham Thai Restaurant
Lois Gajdys
Joni Garcia
Daniel and Sally Gardner
Jason and Maggie Gardner
Jane Garfield
SUPPORTERS

Genentech
Gilead Sciences
Kaye and Ashley Gilliam
Glass by Basha
GlaxoSmithKline
Henry and Stephanie Glowacki
William Gnoss
GoApe
Samantha Gordon
Mary and David Gorny
Noah Gradosky
Crystal and Rodney Grainger
John Grambow
Granma T’s Health Food Store
Laura Gray
Paula Griffin
Ellen Griffith
Sandra Haapala
Hairista Studio
HairStyles by Tim
Zephan Hamlin
Hammock Thrift Shop, Inc.
Gale Hammontree
Hampton Roads Harley Davidson
Hampton Sheriff’s Office
Miles Hamrick
Christine Hardy
Elizabeth Harlow
Harpoon Larry’s Oyster Bar
Susan and Dwayne Harris
Shauna and Steve Hatfield
Carlette Hattett
Hauser’s Jewelers
Haymarket Media Group
Paul Helck
Jeff and Caroline Herath
Jessica Hewitt
Roshaunda Hicks
Hidenwood Shopping Center
Phyllis Hill
Hilton Village Goldsmith
HMP CME
HMP Communications
Wendy Hoegerman
Beth and Jeff Hoer
Katie Hoer
Mary Katherine Hogg
Wayne and Colleen Holcomb
Sharon Hollenbeck
Hope Haven Young Living Essential Oils
Trevor Houser
Phil Howard
Kathy Howell
Howell Creative Group
Brian and Katey Howerton
Sharon Hubbard
Shawn Huddy
Charissa Hurst
Richard and Erin Hurst
Hyatt House Washington DC/The Wharf
Inovalon
David Jackman
Kenneth Jacobs
James Madison University Athletics
James River Country Club
Jason’s Deli
Juan Jacinto
Jim Smith Attorney at Law
Johnson & Johnson Health Care Systems
Christopher Johnson
Pat Jolley
Juan’s Mexican Cafe and Cantina
Nancy Jung
Kaci’s Creations
Kaleidoscope Group
David Kapanka
Tracie Karafa
George Karalis
William Keller
Kisha Kelly
Michael King
Kingsmill Resort
Rebecca Kirch
Kitamaqundi Community, Inc.
Rabin Knight
Nicole Kouri
Kroger
Sarah Kruske
Regina Kurrasch
Holam Lau
Ann-Marie Lawson
Michael and Lisa Leech
Left Behind Photography
by Kyle A. Wilson
Gabriella Legaspi
Lemon Cabana
Leukemia & Lymphoma Society
Liberty Hill Baptist Church
Lilly
Link, Jacobs & Link, DDS
Lauren and Morgan Linkenauger
Tracey and Bart Little
LIVESTRONG Foundation
LPL Financial
Lynx Group, The
Aaron Lyss
Madame & Monsieur Consignment
Boutique
Monica Madden
Magikal Attic, The
Mahan Foundation
Rusty Maney
Brenda Marjaniemi
Marriott Newport News at City Center
Lisa Marshall
David Martin
Teresa Massey
Darren Matthews
Diane Mark
Latresa Maxie-Roberosnn
Eric and Amy McAllister
Sandra McAllister
Matt McCrary
Donald and Joanne McCluckie
Elizabeth McGuire
Jonathan and Theresa McKee
Carla McRae
Mellow Mushroom
Merck
Merck Foundation
Mermaid Wicks
R.M. Metzger
Michael & Susan Dell Foundation
Michael Milbauer
Andy Miller and Brian Stephens
Minuteman Press
Carol Mitchell
Edith Mitchell
John and Helen Mitchell
Kirsteen and Darryl Mitchell
Kenneth and Kathy Mobley
Mae’s Southwest Grill
Beth Moore
Sheila Moore
Morgan Stanley Global Impact
Funding Trust
Joseph Morina
Rachel Moritz
Cheryl Morris
Daniel Morris
Sharron Morrow
Alexandra Moser
Mr. Boil Cajun Seafood Boil
Farangis Mukhidinova
Christopher and Heather Mullaly
Martha Reed Murphy and John Murphy
Wendy and Caroline Murray
Muse Writers Center, The
Keri Myers Hunt
Lisa Napolitano
Bill and Shawn Nason
Shane Nason
National Network of Public Health Institutes
NC State Department of Athletics
Karen Negran
Tammy Neice
Jean and Walt Nelson
Mary Nelson
Network for Good
Newseum
NORC
Norfolk Botanical Gardens
Norfolk Tides Baseball Club
Nothing Bundt Cakes - Newport News
Novartis
Dave and Elizabeth O’Brien
Martha Odum
Old Point National Bank
OnCall Telecom
Opus 9 Steakhouse
Orange County’s United Way
OrangeTheory Fitness
Harmony Owens
Madison Owens
Ozarks Antique Auto Club, INC
Pampered Chef
Pancreatic Cancer Action Network
Deborah Parham Hopson
Parklane Tavern
Stephanie Parks and Neil Martin
Patricia R. Miller Rev. Living Trust
Paypal Charitable Giving Fund
PDMI
Peninsula Fine Arts Center
Peninsula Movie Bistro at Peninsula Town Center
Millie Perez-Anderson
Perfect Setting, The
Steve Perok
Gayle Petrick
PF Chang’s Newport News
Diane Pfeifer
Pfizer
Pharmacy Quality Alliance
PhRMA Foundation
Fierce’s Pitt Bar-B-Que
Pirate’s Cove
Pittsburgh Penguins LP
Plaza Azteca Newport News
Kathleen Pock
Paint at Phoebus, The
Roshanda Poole
Poquoson Diner
Eric Pratum
Priority Chevrolet
Anita Profio
Q Squared Solutions Expression Analysis
RAM Computer Supply
Sylvia Ramirez
Randolph D. Rouse Foundation
Andrew Rapin
Leda Rapp
Reason Research
Nishanth Reddy Karra
Debra J Reed
Mike and Danielle Remy
Revolution Golf and Grille
Alan L Richardson
Johanne Richardson
Bonnie Richmond
Rick & Libby’s
Julia Rieger
Jayme Rieger
Robert Rifkin
Ripley’s Believe It or Not!
Bill and Carolyn Ritchey
Riverbanks Zoo & Garden
Riverfront Golf Club
Riverside Health System
Keith and Leslie Roberts
Meris Robinson
Rocquel Robinson
Mario Rodriguez
Rogue Elephant Coffee Roasting Company
Gloria and Charlene Rollins
Mark Rollins
James Rosensteel
Barbara Royal
Tina Rudolph-Smith and William Smith
Tricia Russell
Theresa Rutherford
Jan and John Saecker
Saint Leo University
Salon Vivace
Salsa’s Mexican Grill
SaltBox Café, The
Daniel Sandefur
Richard Sandman
Atul Kumar S Sandur
Sanofi US
David and Trish Schengber
Schooner’s Bar and Grill
John Schumacher
Score Bowling
Beth Scott
Dawn Scott
Darylene Sebastian
Natasha Senn
Seth Broudy’s School of Surf
Sew Much Better
Michelle and Steven Shanks
Kristin Shealy
Melody Sheard
Shell Oil Company Foundation
Matching Gifts
Linda Shird
Sheryl Sier
Silverman Furs
Colleen Simik
Simonds Industries Inc.
Sit a Spell Seating Company, LLC
Laura Sloan
Carrie Smidl
Renee Smith
Shelley and Keith Smith
Steven Smith
Smithfield Flags
Dave and Ebru Sorensen
Splash Kingdom, Inc.
Greg Spryn
Starbucks Kiln Creek #7440
Starbucks Store 49896
Starving Artist Studio
Hillary Stemple
Valerie Stevens
Ellen and Daysie Stokes
Freddie Storey
John Stout
Odell Smling
Sundays Sun Spa Shop
T. Rowe Price Program for Charitable Giving
TagTime Tactical Laser Tag
Takeda Oncology
Andrew Tao
Latrina Taylor
TekClan Software Solutions
Gina Testani
Maria Testani
Raffaela Testani
Grace Tewkesbury
Theratechnologies
Annekee Thomas
Bruce T Thompson
Nancy Tice and James Millan
Cheri Timko
Eddie Tison
Billy and Shannon Towler
TowneBank
Trader Joe’s
Gemma Trahan
Travel Leaders
Jamie Trotter
Michael and Amanda Troutman
Mike and Annycz True
TRUST by FrontStream
Stephanie Trunk
Donnie and Robbie Tuck
Kathrina Turner
Catherine Twist
Tyngser Automotive Family
United Way of the Capital Region
University of Alabama at Birmingham, The
Vulkan Unsal
Stephanie Van Cuyck
Vanguard Charitable
Keith Vaughan
VCU Athletic Department
Elizabeth Veliz
Sandra and Felix Venezuela
ViiV Healthcare
Mary Kay Villa
Virginia Oncology Associates
Chantal and Carey Waldrip
Walgreens
Angela Walker
Cynthia Walker
Stephanie Walker
Jeremy and Pamela Walters
Stuart and Denise Wash
Washington Nationals
Washington Wizards
Benjamin Weierbach
Devera Weinlauf
Donnie Winfield
Joe and Sher Zarzycki
ZERO - The End of Prostate Cancer

PAF gives back to our community by supporting local charities and events
Memorial Donations

In Memory of Robert Barry
John and Kathy Ashwell
Mary Anne Barry
Timothy and Beverly Boyd
Robert and Donna Jackson
Malcolm and Theresa Phillips
Gloria Pendleton-Schulz and Theodore Schulz
William and Janet Stuchell
Wendy Zajac

In Memory of Arthur Bennett
DeWitt and Barbara Abrams
Allan Bennett
Joyce Bennett
Robert and Lori Bennett
Daria Golazeski
Dennis Heim
Ariann Rockwell
Larry and Donna Kay Younker

In Memory of Anna Mary (Mangan) Bouchard
Kevin Lawrence

In Memory of Deborah Buccat
Rodney Buccat

In Memory of Douglas Byam
Lisa Metzner

In Memory of Freida Creech
Patricia Aguilar
Colleen Eddy
Deborah Harrison
Lynne Koenigsknecht
Valerie Lewis
Larry and Susan Patton

In Memory of Sheila Crowe
Jehmal Hudson

In Memory of Nicholas Davidowsky
Barbara Lotti
Linnea Niclas
Beth Reda

In Memory of Robert DePavao
Marie Elliott
Alexis Eon

In Memory of Andrea Gambill
Janet Tones

In Memory of Harry Thomas Gregory Jr.
Beth Moore

In Memory of John Irving
Toby Meador
B.J. and Jamie Tylka

In Memory of Albert Kim
Pearl Kim

In Memory of Audry Leech
Patricia Bruce
Lamar and Theresa Sargent
Mary Sidwell

In Memory of Helen Linda
Lamonica Elliott

In Memory of Edward Lombardi
Beth and Thomas Gruessner

In Memory of Ida MacCarter
Henry MacCarter

In Memory of Paulina Martyniuk
Helen Martyniuk-Baird

In Memory of Herman Carl Meister
Lorraine Howell

In Memory of Georgette Renze Miller
Joe Cho-Zollinger
Teresa Hurley
Timothy Miller
Christina Radomsky
Tabitha Riggio
Lawrence Ryall
Richard and Donna Winkel

In Memory of Cindi Mulder
Will Reeves

In Memory of Jim Nellis
Jill Reyes

In Memory of Mark Niemi
Kathryn E Barnett

In Memory of Leda Rapp
Madelaine Einbinder

In Memory of Sharon Restivo
Kathleen Dean
Biagio. V. Facchiano
Abigail and Joshua Kleczynski
Colleen Perry

In Memory of Norma Rountree
Vicki Radke

In Memory of Liz Ryan
Carey and Chantal Waldrip

In Memory of Patricia Schwartzmiller
Robert and Ellen Garvin
Timothy and Maryann Kuruce
Patrick Nicholson
Donna Rae Peru
Raymond and Roberts Raccon
Robert and Megan Thompson
Denise and John Zyskowski

In Memory of Andrew Slachta
Charles and Loretta Bastian
Kathleen Callaghan
Karen Conway
Raymond and Linda Slawecki
Susan Zimmerman

In Memory of Nancy Tice
James Millan

In Memory of Robert Vanderford
John and Jo Ann Algee
Herbert Hamilton
Michael and Ada Hamilton
Carlos and Sylvia Jenkins
Robbie Johnson
Treva Kerney
Treasure Rogers
Clarence and Flordeliza Stunson
Clyde Stunson

In Memory of Marjorie White
Richard White

In Memory of Lida Whitehurst
Rebecca and Rufus Whitehurst

In Honor of Kirsten Archambeau
Liz Senn
In Honor of Gwen Darien
Jacqueline G. Darien
In Honor of Madison Davis
Kristina Melo
In Honor of Ora Fardan
Andrea Rader
In Honor of Brooke Flores
Bruce Povalish
In Honor of Manuel Hooper
Robbie Towe
In Honor of Michael Horwitz
Judith Greenstein
In Honor of Nancy Jung
Tricia Russell
In Honor of Brenda Lawson
George Lawson
In Honor of Linda Lowenstein
Judith Greenstein
In Honor of Georgette Renze Miller
Janine McCrosin
In Honor of James Nall
Christine Abbott
In Honor of Lynda Orth
Sandra Basel
Genora Crain-Orth
In Honor of Andrew & Jessica Rapin
Margaret Brazones
In Honor of Noemi Rosado
Marcos Ocasio
In Honor of Maria Testani
Jessica Cohen
Jason Kahan
Seth Miran
Tina Pasillico
Howard Stein
In Honor of Candace Thomas
Jeffrey Thomas
In Honor of Bailey Wilson
Randi Jennings
Jennifer Jones
In Honor of May Luu Wong
Richard Krauel
In Honor of Ededinia Zuniga
Patricia Rosenthal
Board of Directors

Founders
Founder, Nancy Davenport-Ennis & Co-Founder, John H. “Jack” Ennis

Executive Board of Directors
Deborah Parham Hopson, PhD, RN, FAAN*
Board President
Senior Vice President for Public Health Systems Innovation and Senior Public Health Scientist
Maya Tech Corporation

Alan J. Balch, PhD*
Chief Executive Officer
Patient Advocate Foundation/
National Patient Advocate Foundation
Non-Voting Board Member

Nancy Davenport-Ennis*
Founder, Chair Emerita
Non-Voting Board Member

John L. Murphy*
Finance Committee Chair

Diane Mauk*
Board Secretary
Chief Architect/President
Software Architects, LLC

Al Benson III, MD, FACP
Professor of Medicine
Associate Director for Clinical Investigations
Robert H. Lurie Comprehensive Cancer Center of Northwestern University

John H. “Jack” Ennis
Co-Founder
Non-Voting Board Member

Brian Garofalo
Managing Partner - Patient Alliances

Norman Hubbard, MBA
Chief Business Officer at the Office of Health Sciences, Michigan State University
Former Executive Vice President, Seattle Cancer Care Alliance

David Jackman, MD
Medical Director of Clinical Pathways
Dana-Farber Cancer Institute

Aaron Lyss, MBA
Director of Strategic Payer Relations
OneOncology

Otis Maynard, Esq.
Associate General Counsel
United Healthcare

Andy Miller, MHSE, MCHES
Head of Healthcare and Social Services
The Morris Foundation

Edith Mitchell, MD, FACP
Clinical Professor of Medicine and Medical Oncology
Program Leader, Gastrointestinal Oncology
Department of Medical Oncology
Director, Center to Eliminate Cancer Disparities
Associate Director, Diversity Affairs
Kimmel Cancer Center at Jefferson

Pearl Moore, RN, MN, FAAN
CEO (Retired) Oncology Nursing Society

Robert M. Rifkin, MD, FACP
Attending Physician
Rocky Mountain Cancer Centers

Larri Short, JD
Partner (Retired), Arent Fox, LLP

Lori Williams, PhD, MSN, RN
Assistant Professor
Department of Symptom Research
The University of Texas M. D. Anderson Cancer Center

W. Jackson Wisdom
Senior Partner
Martin, Disiere, Jefferson & Wisdom, LLP

*Executive Board Officers
Scientific Advisory Committee

Charles Balch, MD, FACS  
Chair, Scientific Advisory Committee  
Professor of Surgery  
University of Texas  
M.D. Anderson Cancer Center

Pamela S. Becker, MD, PhD  
Physician, Seattle Cancer Care Alliance  
Professor, Division of Hematology  
University of Washington School of Medicine  
Member, Clinical Research Division  
Fred Hutchinson Cancer Research Center

Al Benson III, MD, FACP  
Professor of Medicine  
Associate Director for Clinical Investigations  
Robert H. Lurie Comprehensive Cancer Center  
of Northwestern University

David Brizel, MD, FASTRO  
Leonard R. Prosnitz Professor  
of Radiation Oncology  
Professor in Head & Neck Surgery  
Co-Director, Head & Neck Cancer Program  
Duke University Medical Center

Pamela Douglas, MD, MACC, FASE, FAHA  
Ursula Geller Distinguished Professor for  
Research in Cardiovascular Disease  
Director of Imaging Program at DCRI  
Duke University Medical Center

Jean G. Ford, MD  
Paul J. Johnson, Chair  
Department of Medicine at  
Einstein Healthcare Network  
Philadelphia, PA

Paul J. Martin, MD  
Fred Hutchinson Cancer Research Center  
Professor of Medicine  
University of Washington

Edith Mitchell, MD, FACP  
Clinical Professor of Medicine  
and Medical Oncology  
Program Leader, Gastrointestinal Oncology  
Department of Medical Oncology  
Director, Center to Eliminate Cancer  
Disparities  
Associate Director, Diversity Affairs  
Kimmel Cancer Center at Jefferson

Deborah Morosini, MD  
Vice President, Clinical Affairs & Patient  
Engagement  
Loxo Oncology, Inc.

Robert M. Rifkin, MD, FACP  
Attending Physician  
Rocky Mountain Cancer Centers

Lori Williams, PhD, MSN, RN  
Assistant Professor  
Department of Symptom Research  
University of Texas  
M. D. Anderson Cancer Center

Dr. Sandra L. Wong, MD, MS  
Chair of Surgery  
Dartmouth-Hitchcock & Geisel School  
of Medicine

Honorary Board

Bruce Avery, MD, FACP (1938-2016)  
Hematology-Oncology Knoxville

Richard D. Carter, Esquire  
Richard D. Carter, PLLC

The Honorable Mary T. Christian (1924-2019)  
Virginia House of Delegates (Retired)

Edward G. Connette, Esquire  
Essex Richards, P.A.  
Charlotte, North Carolina

The Honorable Pat Dougherty  
Missouri State Senate (Retired)  
Senior Director of Advocacy (Retired)  
Catholic Charities of St. Louis

Martha E. “Meg” Gaines, JD, LLM  
Distinguished Clinical Professor of Law  
Director, Center for Patient Partnership (CPP)  
University of Wisconsin - Madison

Leah Locke-Arnett, RN, BSN, MHCA  
NCSU Student Health Center (Retired)

William T. “Bill” McGivney, PhD  
Managing Principal, McGivney Global Advisors  
Wayne, PA

Jonathan B. Perlin, MD, PhD, MSHA,  
FACP, FACMI  
President, Clinical Services  
and Chief Medical Officer  
HCA, Inc. (Hospital Corporation of America)

Roy Ramthun, MSPH

Paula Trahan Rieger, RN, MSN, CAE, FAAN  
Former Chief Executive Officer  
Oncology Nursing Society

Leo Sands  
Executive VP & Chief Administrative Officer  
US Oncology (Retired)

Doris Simonson  
Mother of Cheryl Grimmel

Sheldon Weinhaus, Esquire  
Weinhaus & Potashnick  
St. Louis, Mo
It’s All About the Patient

No patient should ever have to face a chronic, life-threatening and/or debilitating illness alone. At PAF our entire team is committed to helping patients and their families navigate life-changing health challenges, and also act as a network of support to alleviate emotional duress by delivering compassionate, effective interventions. As a precision charity, we deliver the right help at the right time, supporting patients where they are in their journey and remaining available to them every step of the way.

Acknowledgments

Editor in Chief
Alan Balch, PhD, Chief Executive Officer

Principal Writer & Senior Editor
Beth Moore, Executive Vice President of Corporate Communications

Contributors
Alan Richardson, Executive Vice President for Strategic Patient Solutions
Beth Hoer, Grants Manager
Bill Nason, MBA, Chief Financial Officer
Carey Waldrip, Director of Special Projects
Eric Anderson, Director of Research & Data Reporting
Erin Singleton, Chief of Mission Delivery
Fran Castellow, MSEd, President of Operations
Jennifer Brewster, MBA, Senior Director of Financial Support Programs
Kathleen Gallagher, MPH, Senior Director of Health Services Research
Rebekah Angove, PhD, Vice President for Patient Experience & Program Evaluation
Shawn Nason, Director of Events & Donor Campaigns
Shonta Chambers, MSW, Executive Vice President of Health Equity Initiatives & Community Engagement
Design
Howell Creative Group