

COVER SHEET 2017 GRANTS - ORRVILLE AREA UNITED WAY

AGENCY NAME: Arthritis Foundation, Great Lakes Region, Northeastern Ohio

Mission Statement: The mission of the Arthritis Foundation is to improve lives through leadership in the prevention, control and cure of arthritis and related diseases.

AGENCY DIRECTOR/PRESIDENT: Name Darby B. Schwartz, Executive Director

Telephone 216-285-2826 Fax 216-831-1764 E-Mail Maildschwartz@arthritis.org

Board President: Name Molly S. Walsh, Board Chair

Address 3035 Carlton Road City Shaker Hts. E-Mail molly@standoutconsulting.net

<u>Compute your Agency's overhead using your most recent 990 using this formula</u>		
Add Management & General (Part IX, Line 25, Column C)		\$ <u>8,420,742</u>
Fundraising (Column D)	+	\$ <u>7,467,666</u>
	=	\$ <u>15,888,408</u>
TOTAL		
Divide total by Part VIII, Line 12, Column A (Total Revenue)		<u>24.9</u> %

Program Funding Requests:

1) Chronic Disease Control New Request? No

Funded 2016 \$ 4,600.00 *2017 Requested* \$ 4,600

2) _____ New Request? _____

Funded 2016 \$ _____ *2017 Requested* \$ _____

3) _____ New Request? _____

Funded 2016 \$ _____ *2017 Requested* \$ _____

4) _____ New Request? _____

Funded 2016 \$ _____ *2017 Requested* \$ _____

\$ 4,600 **Sum Total of all Dollars Requested for 2017**

I affirm that I have reviewed this application for funding, and, to the best of my knowledge, confirm that the information presented here is a financially, statistically, and programmatically accurate representation of our agency.

Darby B. Schwartz
Chief Professional Officer Signature

9/15/16
Date

Molly S. Walsh (Board President
Board President or Treasurer' Name (Please indicate which)

Molly S. Walsh
Board President or Treasurer's Signature 9/15/16
Date

2017 Program Information

Please use a separate form for each program.

1. Agency: Arthritis Foundation, Great Lakes Region, Northeastern Ohio

2. Program Name: Chronic Disease Control Program

A. Based on the targeted outcomes of this program, from which of the following community impact areas are you requesting funding?

Nurturing Children & Youth

(Provides positive outcomes that help children and youth succeed in school and develop into successful adults)

Helping In Hard Times

(Provides emergency assistance: food, shelter, clothing, and legal help)

Developing Life Skills

(Provides positive outcomes with programs that enable individuals and families to become more emotionally, physically, and/or financially stable)

Promoting Health & Wellness

(Provides positive outcomes with programs that enable individuals and families to have access to prevention and/or treatment in the health arena, enabling them to become and/or stay healthier emotionally, physically, and/or financially)

B. Is this Program

New program

Expanded program

Continuation of a previously funded program

3. Please complete the following for each program:

<u>\$4,600</u>	+	<u>\$36,070</u>	=	<u>\$43,785</u>
Funds Requested From OAUW		Funds Requested/Received From Other Sources		Total Program Funds

4. If previously funded program, are you asking for increased dollars of support?

Yes No

5. If yes, why are you requesting more money?

6. If your program was not funded for the full amount you requested for 2016, what impact did this have on your program? What adaptations did you have to make?

Our program was not fully funded in 2016, so we were unable to take any action to increase our presence in Wayne County. However, with an increased on-line presence and numerous new online tools, we were able to leverage our website to continue serving people in Wayne County, despite the decrease in funding.

7. How will the agency adapt this program next year if your requested funding level cannot be met or if a decision is made that the program will not be funded at all next year?

If the requested funding level cannot be met, then we will not be able to respond to requests for new educational programs, and we will reduce the amount of free educational literature we can offer.

If the program were not funded at all this year, we would not be able to offer the Arthritis Foundation Chronic Disease Control program in the Orrville area. Our United Way allocation represents approximately 18% of the cost of providing this program; it would be difficult to make up this large loss through other funding sources.

Research shows that early diagnosis and treatment of arthritis and related diseases can prevent or limit long-term disability, and that healthy behavior choices such as exercise, weight management and stress control can tremendously increase an individual's functional ability; and lessen the physical, emotional and financial impact of arthritis. Without our Chronic Disease Control Program, individuals impacted by arthritis, their family members, caregivers and employers lose access to educational programs that promote this information in an accurate and medically sound way.

The Arthritis Foundation Chronic Disease Control Program is a cost-effective way to help individuals manage the impact of living with a chronic disease, remaining productive members of the community, able to live as independently as possible, and maintaining the best possible quality of life.

8. Please describe the fees and reimbursements associated with this program.

Fees:

All Category 1 (Health Education/Awareness-Building) activities, including educational programs and literature, are offered at no charge to the public.

Sliding Fee Schedule: N/A

Insurance Reimbursement: N/A

Government Subsidies: N/A

Community Impact

8. Describe the target population and eligibility requirements for the Program:

Unfortunately, arthritis knows no age restrictions. Children as young as 2 months old can be diagnosed with Juvenile Arthritis up to the stereotypical grandparent diagnosed with Osteoarthritis and everything in between. The Arthritis Foundation Chronic Disease Control Program is available, free of charge, to individuals of any age who are impacted by any of the more than 150 forms of arthritis and related diseases. Program activities are also open to family members, caregivers, employers, healthcare professionals and anyone interested in learning more about arthritis or chronic pain. Individuals are not required to have an arthritis diagnosis to participate in any activity in the program.

9. What agencies or programs in the community provide similar services? Please be specific about how we can differentiate this program from others.

The Arthritis Foundation is the ONLY organization in the Orrville community providing programs and services specifically designed to improve the physical, social, financial and emotional conditions of residents, their families and caregivers dealing with arthritis.

It is important to note that although we are unique in the Orrville area in the programs and services we provide, we work in collaboration with other local organizations or agencies. These host sites provide free facility space, assist with publicity, and often provide staff to assist. The Arthritis Foundation is responsible for providing the quality assurance and overall management of our program/service. We are very proud of our strong partnerships with organizations such as Aultman Orrville Hospital that allow us to bring diverse programs and services to the local community.

Impact Analysis

10. Describe the targeted outcomes of this program. In other words, you ran this program, you gave clients certain skill sets, you increased their knowledge, and you treated their illness, which is all good. But how have you changed the lives of those people, and as a result, our community?

Please include the following information in your narrative *and limit this to 2 pages*:

- **Description of the activities and resources you use to accomplish these outcomes**

Category 1 activities build awareness and knowledge of arthritis prevention, signs and symptoms, management strategies and treatment options. These single-session-contact activities include the toll-free “Arthritis Answers” Information & Referral Service, public and professional education forums, Arthritis Expos, Speakers Bureau, health fair exhibits, juvenile arthritis programs and services, the distribution of free educational literature. In addition, the Arthritis Foundation now offers one-on-one support through our toll-free Helpline that launched earlier this year – 1-844-571-HELP (4357). Individuals with arthritis, family members and care givers can reach out for answers for any routine or complex questions regarding arthritis or related diseases. We have licensed clinical social workers on staff that can talk about a variety of topics, including access to care (physicians, insurance, medications), financial assistance, insurance questions, support groups, transportation, veteran benefits and more. The Helpline is open 24 hours a day. If our staff is unavailable when someone calls, the message will be returned within 24 hours. We have an abundance of information on our website but understand that sometimes it’s easier to pick up the phone and speak directly with someone who can help.

In order to better serve the more than 50 million people with arthritis, the Arthritis Foundation nationally refined its direction in the beginning of 2015. Our mission remains the same – to provide leadership in the prevention, control and cure of arthritis and related diseases. We target four focus areas:

- **HELP & SUPPORT** - through Information & Referral opportunities, online tools and local education programs geared to providing people with arthritis the information that they need. This is the focus area that encompasses the Arthritis Foundation Chronic Disease Control Program.
- **RESEARCH** – where we are the hands-down largest non-government funder of research to unlock a cure for arthritis.
- **JUVENILE ARTHRITIS** – with access to tools such as the JA Power Pack, JA Summer Camps, National JA Conferences, National Advocacy Summit in Washington DC and local JA Family Days, the Arthritis Foundation empowers JA families to learn more and take control of their child’s arthritis.
- **ADVOCACY & ACCESS** – taking a more targeted approach to advocacy on the state level while being a stronger, influential voice for access to medications and resources.

The Arthritis Foundation has played a significant role in changing the landscape of physical activity programs for people with arthritis. Thirty years ago, we worked to fill a void and provide exercise options for people with arthritis. Today, the culture and knowledge base around fitness is much better, and there are many community-based classes that incorporate the safety modifications we originally created. Our role today is to encourage people to be physically active through any channel.

Although we are no longer directly managing land-based exercise classes, our partnership with the Aquatic Exercise Association (AEA) provides options for our constituents to continue important exercise classes in the community.

An increased focus has been placed on providing important information on the Arthritis Foundation website, offering a community resource finder, exercise videos, educational information and information on how to live well with the disease. For example, new tools, such as The Better Living Tool Kit (BLTK) is an excellent resource for those who have been diagnosed with arthritis. We are pleased to report that our quantity of BLTKs sent to constituents in Wayne County has doubled in 2016 (to date). Your Exercise Solution (YES) help people suffering with arthritis determine what exercise would be safe and effective for them. Our Track + React mobile app offers day-by-day on-line wellness tools to help track symptoms, nutrition, medication, exercise and other activities to help monitor individual health trends over time. Finally, electronic newsletters and Arthritis Today magazine are other important resources that are available free of charge.

- **Information about the tools you use to measure outcomes**

All evaluation surveys used to measure outcomes in activities in the Chronic Disease Control Program were reviewed and validated by the Center for Health Disparities (a partnership between MetroHealth Medical Center and Case Western Reserve University) in Cleveland.

- Evaluation surveys are completed by phone for Arthritis Answers callers and at the conclusion of every public education program. Questions assess increase in knowledge, potential behavior changes and satisfaction with the program.

- **Dialogue about the challenges you face in measuring the success of the program**

Participants are occasionally reluctant to fill out evaluations due to lack of time, not being willing to share personal information about pain, etc. We also rely heavily on volunteers to collect evaluations; if we were able to make this part of an employee's job responsibilities, we might possibly have a higher rate of return. We make an effort to explain why these evaluations are so important to us, and provide incentives where possible (for example, giving a copy of *Arthritis Today* magazine or the latest arthritis Drug Guide to those who turn in evaluations after an Arthritis Expo).

With the increased emphasis on our on-line resources, tracking the number of people served in a specific area becomes more challenging as well.

Maybe delete the highlighted sentences – that sounds odd to me. Instead of saying “giving a gift”, say for example, a copy of Arthritis Today magazine or a copy of the latest Drug Guide.

- **Specific information about the recorded outcomes you achieved last year**

As previously mentioned, because we have partnered with the AEA, we do not receive regular, specific reports as to outcomes of the exercise program. However, this remains an important option for people with arthritis and we remain committed.

- **Discussion of whether or not your outcomes met, exceeded or fell short of your desired outcomes**

We are confident that our outcomes have met our desired outcomes.

Local donors can be assured that they are funding programs that make a real difference in people's lives.

Program Outputs

11. Define a unit of service. If it is not possible to define one unit, please state why.

Remember that whatever the method of measurement, you are consistent from year-to-year.

A unit of service is a single contact by an individual – one phone call, attendance at a single public education program, or attendance at one session of a multiple-session class.

12. Complete the following if the agency is seeking United Way funding for this program.

Year	Number of Clients in zip codes 44667, 44618, 44645	Number of Clients in all of Wayne County	Clients on a Waiting List
2015 Actual	1,300	1,900	0
2016 Projected	1,300	2,011	0
2017 Projected	1,300	2,000	0

13. Unit Cost: Please explain changes either up or down in your cost.

Year	Individuals or Units of Service	Total Cost of Program	Unit Cost (Cost/Units)
2015 Actual	38,910 units of service	\$41,595	\$1.08
2016 Projected	40,860 units	\$43,785	\$1.08
2017 Projected	40,860 units	\$43,785	\$1.08

14. Individuals served

Last year (actual): 1,300

This year (projected): 1,300

Client Demographics

14.

	NUMBER
Types of Clients: Individuals	1,300
Information & Referral, Brochures	4,800 brochures
Organizations	

PLEASE COMPLETE THE INFORMATION FOR INDIVIDUAL CLIENTS ONLY		
Age Group: Under 5		2
6 thru 12		5
13 thru 17		5
18 thru 34		21
35 thru 54		200
55 thru 64		325
65 thru 74		338
75 thru 84		175
85 and over		101
Unknown		128
TOTAL INDIVIDUALS:		1,300
Gender: Male		198
Female		1,102
Unknown		
TOTAL INDIVIDUALS:		1,300

	NUMBER		NUMBER
Household Income:		Ethnic/Racial Background:	1088
\$0 thru \$11,999		White	
\$12,000 thru \$14,999		Black or African American	95
\$15,000 thru \$24,999		Hispanic or Latino	12
\$25,000 thru \$49,999		American Indian or Alaska Native	0
\$50,000 thru \$74,999		Asian	8
More than \$75,000		Native Hawaiian or Pacific Islander	0
Unknown	1,300	Unknown	97
TOTAL INDIVIDUALS:		TOTAL INDIVIDUALS:	1,300

*NOTE: All TOTALS should be the same number

**Orrville Area United Way
Supplemental Agency Questions**

Arthritis Foundation, Great Lakes Region, Northeast Ohio
Agency Name

9/9/16
Date

Please check the appropriate box in answer to each question.

	Yes	No	Don't Know
Does the agency have checks/balances and distribution of responsibilities such that tasks such as opening mail, paying bills, signing checks, bookkeeping, producing internal financial reports do not rest in the hands of too few persons?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have the board and top administrative officers discussed/reviewed/agreed upon what is appropriate in terms of division of these responsibilities?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have a board approved Fiscal Policy?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did the auditor meet with the board and top administrator to discuss audit results?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the board conduct an annual evaluation of the top administrative officer?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the evaluation results in written form?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have written by-laws to which they adhere?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the board and/or a Financial Committee or Executive Committee review complete financial statements monthly including cash flow statements?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the agency goals/objectives/plans in written form?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do the agency by-laws/guidelines specify a length of term for board members?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are board members required to rotate off the board for some minimum amount of time upon completion of some maximum time of service?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the agency currently compliant with guidelines for submitting an Audit including the management letter, 990, Agency Agreement, and Verification of Registration with the State of Ohio Attorney General's Office to United Way?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What percentage of your Board financially supports your agency?	100%		

Molly S. Walsh

Darby B. Schwartz

Molly S. Walsh, Board Chair

Darby B. Schwartz, Executive Director

Arthritis Foundation
One Entity Budget
Fiscal Year 2016
(\$000) in thousands

	2014 Actual	2015 Projections	2016 Board- Approved Budget
All Funds			
INCOME			
Direct Public Support	52,258	50,233	51,715
Bequests Revenue	26,950	13,000	14,000
Other Operating Revenue	15,966	17,198	15,522
Total Operating Revenue	\$ 95,173	\$ 80,431	\$ 81,237
EXPENSES			
Research	8,499	8,688	8,688
Salaries, Payroll Taxes, & Benefits	41,814	39,313	37,149
Professional Fees	7,724	6,776	6,250
Direct Marketing Expense	9,754	8,424	8,309
Printing and Postage	5,335	5,454	5,200
Travel, Meetings and Conferences	4,928	4,907	4,752
All Other Expenses	12,768	11,255	10,889
Total Operating Expenses	\$ 90,822	\$ 84,818	\$ 81,237
NET INCOME (LOSS)	\$ 4,351	\$ (4,387)	\$ 0