

COVER SHEET 2018 GRANTS - ORRVILLE AREA UNITED WAY

AGENCY NAME: Arthritis Foundation, Inc.

Mission Statement: The Arthritis Foundation is the Champion of Yes. Leading the fight for the arthritis community, the Arthritis Foundation helps conquer everyday battles through life-changing information and resources, access to optimal care, advancements in science, and community connections.

AGENCY DIRECTOR/PRESIDENT: Name Darby Bentoff Schwartz

Telephone 216-285-2826 _____ Fax _____ E-Mail dschwartz@arthritis.org

Board President: Name Molly Walsh _____

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

Compute your Agency's overhead using your most recent 990 using this formula

Add Management & General (Part IX, Line 25, Column C)		\$ 8,420,742
Fundraising (Column D)	+	\$ 7,467,666
	=	\$ 15,888,408
TOTAL		
Divide total by Part VIII, Line 12, Column A (Total Revenue)		25 %

Program Funding Requests:

1) Chronic Disease Management _____ *New Request?* No _____

Funded 2017 \$2,300 _____ *2018 Requested* \$4,600 _____

2) _____ *New Request?* _____

Funded 2017 \$ _____ *2018 Requested* \$ _____

3) _____ *New Request?* _____

Funded 2017 \$ _____ *2018 Requested* \$ _____

4) _____ *New Request?* _____

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

\$ 4,600 _____ **Sum Total of all Dollars Requested for 2018**

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

9/1/17
Date

Board President

Molly S. Walsh

9/1/17

Board President or Treasurer' Name (Please indicate which)

Board President or Treasurer's Signature

Date

2018 Program Information

Please use a separate form for each program.

1. Agency: Arthritis Foundation, Inc. _____

2. Program Name: Chronic Disease Management _____

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)

X **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

X Continuation of a previously funded program

3. Please complete the following for **each program**:

\$4,600 +	\$5,000 =	\$9,600
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?

X _____ Yes _____ No

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

We would like to continue offering the Wayne County Arthritis Expo and initiate two new programs as part of the Chronic Disease Management Program.

6. If your program was not funded for the full amount you requested for 2017, what impact did this have on your program? What adaptations did you have to make?

Our program was not fully funded in 2017, 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 Orrville, 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 is not met or if the Chronic Disease Management Program is not funded at all next year, then we may not be able to provide the Wayne County Arthritis Expo in Orrville or introduce new programs in the area, including a Support Group and Osteoarthritis program (see below).

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

There are no fees to participate in Chronic Disease Management Program activities.

Fees:

Sliding Fee Schedule:

Insurance Reimbursement:

Government Subsidies:

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 Management 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 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 resources specifically designed to improve the physical, social, financial and emotional conditions of residents, their families and caregivers dealing with arthritis.

We work in collaboration with local physicians from the Arthritis Clinic and Wooster Orthopaedic & Sports Medicine Center, as well as Aultman Orrville Hospital. They help us to share information with patients regarding online tools and resources and events such as Walk to Cure Arthritis and Jingle Bell Run. This year Dr. Gesler and staff at Wooster Orthopaedic & Sports Medicine Center formed a Walk team and joined over 2,000 participants at the Cleveland Zoo to raise awareness about arthritis and funds to support our mission.

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**

Our signature program in the Orrville area is the Wayne County Arthritis Expo. This year will be the seventh in a row that this free public education program has been held. Each year the majority of attendees have indicated “strongly agree” or “agree” on the evaluations that the program “met their expectations” and they “would recommend the program to others”.

We continue to expand our offering of free online resources as well as community programs including the following:

Arthritis Resource Finder to locate exercise classes and community resources by zip code.

Better Living Toolkit that provides information, tips and tools that help individuals work with their doctors to develop the best treatment plan for their unique needs, so they can continue to enjoy the things that are most important to them.

Drug Guide which provides helpful information on prescription and over-the-counter medications.

Living Your Yes with RA is a personalized goal setting event where attendees receive free, expert advice from a local rheumatologist and learn how to set goals that can help them live life to its fullest.

Magazines including Arthritis Today, RA & You and PsA & You.

Mobile Apps such as Your Exercise Solution which provides personalized suggestions for safe exercises based on fitness and pain levels and Tract + React which uses a simple interface (just click or slide) to capture key daily activities and symptoms and provides instant results on a graph that reveal the potential relationship between actions and symptoms.

Prescription for Access is a new initiative that was recently launched to proactively address the concerns of our constituents such as access to medications and treatments. Prescription for Access tools & resources include the Your Coverage, Your Care toolkit, Five Things You Can Do Now to Improve Ease & Access to Care, Patient Principles for Health Care, and Legislative Patient Principles for Health Care Reform.

Wipe Out Gout to learn how to manage the disease and keep flares to a minimum.

We also offer a Helpline staffed by social workers to answer questions regarding insurance, medications, etc.

In addition, we are introducing two new programs as part of an expanding range of Arthritis Foundation resources that provide personalized help & support to adults with all types of arthritis and rheumatic conditions:

Arthritis Support Networks

Our peer-led, local support networks offer connection, education and empowerment. Groups meet at least six times a year and feature a combination of educational and social activities that are inclusive to people living with all types of arthritis. Trained volunteer leaders share a common goal of bringing people together for activities focused on mutual support and positive coping strategies for living well.

OA “Life Hacks”

Arthritis Foundation market research studies show that daily living is a real challenge for individuals with osteoarthritis:

- 42% report difficulty in getting dressed
- 47% report difficulty climbing in and out of bed
- 54% report difficulty picking something off the floor
- 68% report difficulty getting in and out of a vehicle
- 47% report likelihood to switch brands for a product that is easier to use

In addition, patient input sessions show that people with arthritis are looking for “life hacks”, e.g. “arthritis friendly” shoes, “arthritis friendly” kitchen gadgets, other products/tips as well as expert advice to help navigate the day.

The OA “Life Hacks” program brings people with OA together in their local community and through virtual communities. The program was designed to provide value to people with arthritis in the short-term, i.e. life hacks they can use immediately, input from professionals, etc. as well as encouraging an active, healthy and easier life. Program examples include:

“Daily Living Life Hacks” - Tips/tricks for finding the right clothes/shoes, life hacks for household cleaning; and helpful assisted devices for dressing.

“Gardening Life Hacks” - Overview of the benefits (including emotional health benefits) of gardening, gardening life hacks, and helpful equipment.

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

All evaluation surveys used to measure outcomes in activities in the Chronic Disease Management 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 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 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.

- **Specific information about the recorded outcomes you achieved last year**
The summary of the expo evaluations shows that over 90% of attendees “feel more confident in my ability to meet the challenges of living with arthritis”.
- **Discussion of whether or not your outcomes met, exceeded or fell short of your desired outcomes**
Based on expo evaluations, we are confident that our outcomes have met our desired outcomes.

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, e.g. one phone call or attendance at a single public education program.

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
2016 Actual	N/A	N/A	N/A
2017 Projected	N/A	N/A	N/A
2018 Projected	N/A	N/A	N/A

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)
2016 Actual	N/A	N/A	N/A
2017 Projected	N/A	N/A	N/A
2018 Projected	N/A	N/A	N/A

14. Individuals served Last year (actual): We are unable to determine the total number of individuals who downloaded free literature and apps or other information from our website. Expo attendance was 40.

This year (projected): We anticipate expo attendance to be 50-60. We would like to initiate one support group comprised of 10-15 individuals to start with and one OA Hacks program with 25-35 attendees.

Client Demographics – N/A

14.

	NUMBER
Types of Clients: Individuals	
Information & Referral, Brochures	
Organizations	

PLEASE COMPLETE THE INFORMATION FOR INDIVIDUAL CLIENTS ONLY		
Age Group: Under 5		
6 thru 12		
13 thru 17		
18 thru 34		
35 thru 54		
55 thru 64		
65 thru 74		
75 thru 84		
85 and over		
Unknown		
TOTAL INDIVIDUALS:		100%*
Gender: Male		
Female		
Unknown		
TOTAL INDIVIDUALS:		

	NUMBER		NUMBER
Household Income:		Ethnic/Racial Background:	
\$0 thru \$11,999		White	
\$12,000 thru \$14,999		Black or African American	
\$15,000 thru \$24,999		Hispanic or Latino	

\$25,000 thru \$49,999		American Indian or Alaska Native	
\$50,000 thru \$74,999		Asian	
More than \$75,000		Native Hawaiian or Pacific Islander	
Unknown		Unknown	
TOTAL INDIVIDUALS:		TOTAL INDIVIDUALS:	

*NOTE: All TOTALS should be the same number

**Orrville Area United Way
Supplemental Agency Questions**

Arthritis Foundation, Inc.

8/14/17

Agency Name

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?	x <input 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?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have a board approved Fiscal Policy?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did the auditor meet with the board and top administrator to discuss audit results?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the board conduct an annual evaluation of the top administrative officer?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the evaluation results in written form?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the agency have written by-laws to which they adhere?	x <input 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?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the agency goals/objectives/plans in written form?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do the agency by-laws/guidelines specify a length of term for board members?	x <input 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?	x <input 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?	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What percentage of your Board financially supports your agency?	100 %		

Wally S. Walsh

Board Chair

Governing board representative (name, title)

Danby B. Schwartz, Executive Director
Administrative official (name, title)

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Molly S. Walsh	<i>Standout Consulting, LLC</i>
Glade T. Pauley, MA, AT	<i>Infinity Orthopedics</i>

Arthritis Foundation

	Budget 2017
Operating Income	
Direct Response Marketing Contributions	\$ 9,620
Corporate contributions	\$ 12,804
Personal contributions	\$ 3,517
Foundations	\$ 2,224
Other direct contributions	\$ 590
Total contributions	\$ 28,754
Special events - gross income	\$ 26,335
Less direct donor benefit costs	\$ 4,872
Special events - adjusted gross	\$ 21,463
Total direct public support without bequest/planned giving	\$ 50,217
Federated campaigns	\$ 580
United Way	\$ 423
Total indirect public support	\$ 1,003
Government grants	\$ 150
Investment and royalty income	\$ 3,881
Sales and services fees	\$ 3,246
Advertising income	\$ 6,100
All other income	\$ 200
Total Operating income without bequest/planned giving	\$ 64,797
Operating Expenses	
Research awards and grants	\$ 10,000
Salaries, Payroll taxes & Benefits	\$ 36,463
Professional fees	\$ 7,239
Arthritis Today Commissions & Fulfillment	\$ 865
Supplies	\$ 475
Printing, publications, and artwork	\$ 2,763
Direct Response Marketing expenses	\$ 8,250
Postage, shipping, and delivery	\$ 2,683
Telephone	\$ 730
Occupancy	\$ 3,555
Staff & Volunteer Travel	\$ 2,272
Meeting and Conferences	\$ 2,755
Equipment lease and maintenance	\$ 1,090
Advertising	\$ 193
Depreciation and amortization	\$ 1,160
All other expenses	\$ 3,650
Total operating expenses	\$ 84,142
Bequests/planned giving revenue	\$ 13,500
Net Change in Operating	\$ (5,845)
Unrealized gains/(losses) on Beneficial Interest in Perpetual Trusts and Split Interest Agreements	\$ -
Non-operating investment returns	\$ -
Gain on Sale of Fixed Assets	\$ -
Net change in pension liability	\$ -
Net Non-operating income	\$ -
Total Income over/(under) Expenses	\$ (5,845)

Helen Meyers

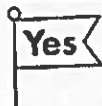
From: Mary Bird <mbird@arthritis.org>
Sent: Tuesday, September 5, 2017 12:17 PM
To: Helen Meyers
Subject: Request for Document

FYI regarding 2018 projected. ☹

Mary L. Bird
Arthritis Foundation
Community Engagement Director
Arbor Court 1
30775 Bainbridge Road, Suite 210, Solon OH 44139
216-285-2839 or 330-495-7113 (cell) | mbird@arthritis.org



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From: Jane Bascle
Sent: Tuesday, September 05, 2017 12:05 PM
To: Mary Bird <mbird@arthritis.org>; Darby Schwartz <dschwartz@arthritis.org>; Rose Thomas <rthomas@arthritis.org>
Cc: Nicole Kloiber <nkloiber@arthritis.org>
Subject: RE: request for documents

Hi Mary,
We are just now beginning the 2018 Budget process. We wont have those numbers until December.

Jane Bascle
Arthritis Foundation
Vice President, Finance
1355 Peachtree Street, Suite 600 Atlanta GA 30309
O: 404.965.7510 M: 678.327.3386 | jbascle@arthritis.org



arthritis.org



From: Mary Bird

Sent: Tuesday, September 5, 2017 11:04 AM

To: Jane Bascle <jbascle@arthritis.org>; Darby Schwartz <dschwartz@arthritis.org>; Rose Thomas <rthomas@arthritis.org>

Cc: Nicole Kloiber <nkloiber@arthritis.org>

Subject: RE: request for documents

Good Morning,

We submitted our application to United Way on Friday and received a response today requesting 2018 projected. Are you able to provide this?

Thank you.

Mary L. Bird

Arthritis Foundation

Community Engagement Director

Arbor Court 1

30775 Bainbridge Road, Suite 210, Solon OH 44139

216-285-2839 or 330-495-7113 (cell) | mbird@arthritis.org



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Helen Meyers

From: Helen Meyers
Sent: Tuesday, September 5, 2017 10:45 AM
To: Mary Bird
Subject: 2017 Budget
Attachments: Arthritis Foundation 2017 Budget.pdf

Mary,

I know our volunteers will question your submission. I'm looking at the page marked 'Arthritis Foundation' top left corner, then the 2017 budget (attached). I received no 2016 actual, nor have you provided 2018 projected. I am perhaps making an incorrect assumption that this is for the Arthritis Foundation requesting the grant from our UW - am I??

When I looked at the page, I noticed that the income for 'United Way' is listed at \$423.

Any clarification you send me will be passed along to our volunteers.

Thank you.

Helen

Helen V. Meyers, Executive Director
Orrville Area United Way
140 E. Market St.
Orrville OH 44667

Changing Lives Since 1958



Helen Meyers

From: Mary Bird <mbird@arthritis.org>
Sent: Tuesday, September 5, 2017 12:02 PM
To: Helen Meyers
Subject: RE: 2017 Budget
Attachments: One Entity Budget 2016.pdf

Hi Helen,

Good questions! I apologize for the confusion and should have provided clarification. We do not provide budgets at the local level any longer. The 2017 budget is at the national level and includes all AF markets and the home office in Atlanta. Income for UW nationally is \$423,000.

Attached is the 2016 "one entity budget" – again at the national level for all AF offices.

I understand there will be questions from the volunteers regarding financials and will do my best to answer them. I requested 2018 projected.

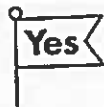
I'll provide the national board attendance and local leadership board attendance lists later today or tomorrow.

Thank you for your patience and for following up with me for additional information.

Mary L. Bird
Arthritis Foundation
Community Engagement Director
Arbor Court 1
30775 Bainbridge Road, Suite 210, Solon OH 44139
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From: Helen Meyers [<mailto:Helen.Meyers@OAUW.org>]
Sent: Tuesday, September 05, 2017 10:45 AM
To: Mary Bird <mbird@arthritis.org>
Subject: 2017 Budget

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

	<u>2014 Actual</u>	<u>2015 Projections</u>	<u>2016 Board- Approved Budget</u>
	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	<u>\$ 95,173</u>	<u>\$ 80,431</u>	<u>\$ 81,237</u>
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	<u>\$ 90,822</u>	<u>\$ 84,818</u>	<u>\$ 81,237</u>
NET INCOME (LOSS)	<u>\$ 4,351</u>	<u>\$ (4,387)</u>	<u>\$ 0</u>