

American Pain Foundation

OPERATING PLAN AND BUDGET FOR 2001

(For presentation to the Board of Directors on January 20, 2001)

Our Mission

The American Pain Foundation is an independent, nonprofit information, education and advocacy organization serving people with pain. Our mission is to improve the quality of life for people with pain by raising public awareness, providing practical information, promoting research, and advocating to remove barriers and increase access to effective pain management.

Our Vision

The American Pain Foundation is widely recognized and used as the "go to" national resource for patient information, education and advocacy serving people with pain.

INTRODUCTION

At least year's board meeting on March 27, 2000, the Board discussed and adopted a three-year plan with five strategic objectives to achieve APF's mission and vision:

1. *Advocating for Quality Pain Care:* To lead or participate in initiatives that remove barriers, increase access, promote research, and change healthcare delivery systems to achieve effective pain management.
2. *Providing Patient Information and Education:* To provide current, accurate, useful and easily accessible information about pain management and patients' rights [to people with pain].
3. *Increasing Public Awareness:* To establish pain as a crucial healthcare issue in the public dialogue and reduce the public's misunderstandings about pain.
4. *Achieving National Recognition and Impact:* To ensure that the American Pain Foundation is nationally recognized and widely used by the public as a resource on pain.
5. *Building Internal Infrastructure:* To establish and maintain a sound, stable infrastructure to implement cost-effective programs that successfully advance our mission.

In 2000 we made significant strides in attaining each of these objectives. Our plan for 2001 builds and expands on our work last year in ways that are sharply focused on achieving our five major objectives, with an emphasis on the components of our *Stop Pain Now!* campaign. This plan will advance those objectives by concentrating APF's resources on 10 major programs and projects as follows:

1. Increase Grant and Individual Fundraising
2. Promote Public Awareness and Patient Education, Especially Through the JCAHO Opportunity
3. Build the Next Generation of Our Website
4. Conduct Media Relations to Promote APF and the *Stop Pain Now!* Campaign
5. Initiate the *Stop Pain Now!* Grassroots Outreach Project
6. Propose Proactive Federal Legislation
7. Launch an APF Monthly "E-Newsletter"
8. Upgrade and Expand Patient Information Services
9. Pursue NCQA Evaluation of Pain Management by HMO's
10. Develop the APF Board

1. Increase Grant and Individual Fundraising

Goal: Raise \$872,500 in donations from corporations, foundations, other organizations and individuals, to end the year with a surplus.

We have over ten proposals to corporations and foundations outstanding, and several more to be submitted in the near future. We estimate our chances for each as follows:

Grant Funding Likely

• Endo	\$20-50k
• Medtronic, Inc.	10-20k
• Medtronic Foundation	50-150k
• Milbank Foundation	25-50k
• Purdue: Match	250k
• Purdue: <i>Stop Pain Now</i>	<u>150-250k</u>
Total	\$505-770k

Grant Funding Promising

• APS	\$50k
• Cummings Foundation	50-115k
• Janssen	50-100k
• Merck Foundation	50-100k
• Pharmacia/Pfizer	<u>200-400k</u>
Total	\$400-765k

Grant Funding Possible (est.)

• AAPMedicine	\$1k
• AAPMgmt.	1k
• Abbott/Knoll	100k
• Bristol-Myers Squibb	100k
• Glaxo-Wellcome	50k
• Merck, Inc.	100k
• Open Society Institute	100k
• Ortho-Biotech	100k
• Ortho-McNeil	100k
• RWJ Foundation	<u>250k</u>
Total	\$902k

Other Grant Prospects to Pursue

In addition, we intend to pursue the following funding prospects (among others):

- Advanced Neuromodulation Systems
- Anesta/Algos
- Astra- Zeneca
- Baxter
- Bayer

- Elan
- Eli Lilly
- Atlantic Foundation
- Blaustein Foundation
- Gates Foundation
- Kaiser Family Foundation
- Levi Family Foundation
- MacArthur Foundation
- McNeil Consumer Products
- Meyerhoff Foundation
- Pew Charitable Trusts
- Rockefeller Foundation
- Starr Foundation

Grants for Program with National Health Council and Partnership for Caring

We intend to pursue the possibility of joining with these two national organizations in seeking \$12 million dollars or more from industry sources for a major public awareness campaign, initiated by Ira Byock, that would enable us to greatly expand our patient information and services through our web site, other internet-based mechanisms, our toll-free number, and printed materials. (See separate memo under Tab 7 in the Board book for more details.)

Individual Funding Likely

We expect to raise \$20,000 to \$50,000 in 2001 through renewal contributions from existing donors, direct mail to new donors, and the beginning of a major gifts campaign. With minimal effort on individual fundraising in 2000 we raised over \$16,000 from individuals. We hope to double the amount of individual gifts we received vs. 2000 via several means:

- A. Complete the direct mail campaign to 7,000 pain professionals.
- B. Conduct a second direct mail campaign after building database of potential donors via web site, newsletter, e-newsletter, etc.
- C. Seek more major gifts by Exec. Dir. and follow up on individual prospects from board members.
- D. Add donor recognition and "How to Give" sections to the APF Web Site.
- E. Join selected federated campaigns.

Income Projections for the Budget

For budget purposes we have estimated fundraising income in a conservative manner. For grant funding above labeled "Likely," we assume we will raise an amount equal to the average of our

high and low estimates of grants we are highly likely to receive this year. For grant funding labeled "Promising," we assume we will raise only 50% of our low estimate of grants from funders we conclude are highly promising prospects. For the \$902,000 in grant funding labeled "Possible," we were conservative and did not assume that we would win any of these grants. And for individual funding, we assume the midrange of our low-end and high-end estimates of what we are likely to raise.

2. Promote Public Awareness and Patient Education, Especially Through the JCAHO Opportunity

Goal: Promote visibility and impact of APF, and position APF as the leading consumer organization on pain, while educating the public and others on the pain issue through the opportunity generated by the new JCAHO standard.

- A. Print and widely distribute 250,000 copies of APF's *Pain Action Guide* (less expensive version) and *Bill of Rights* to JCAHO institutions via:
- All organizations in our database
 - AHA contact
 - Direct mailings to top institutions
 - Newsletter, E-newsletter and web promos
 - Network of JCAHO consultants
 - VA Hospital system
 - Other distribution mechanisms

Recommendations on distribution:

- Distribute copies to nonprofit institutions for free initially to maximize our reach to patients and promote APF's name recognition/visibility
- Seek funding to underwrite printing/mailing costs
- Revisit policy mid-year

- B. Generate media coverage of our *Pain Action Guide*, *Bill of Rights*, and APF as a key source of information.
- C. Participate in major national and regional meetings as patient information/rights expert (i.e., the "Voice of Patients")

- D. Acquire other JCAHO-related materials for consumers and health professionals

⊕ Spanish BOR ⊕ Finding A Doc ? Romanian (Mick)

3. Build the Next Generation of Our Website

Goal: Achieve the best, most widely recognized and used consumer-oriented web site on pain.

- A. Significantly redesign the site for better navigability, ease of use, and greater consumer appeal.

- B. Expand and update the content in several directions, especially on chronic, nonmalignant pain and related issues.
- C. Strategically market and promote the upgraded web site via new e-newsletter, portals, etc. to increase usage/visits several-fold.

④. Finding A Doc ⑤ EOL Section

4. Conduct Media Relations to Promote APF and the *Stop Pain Now!* Campaign

Goal: Obtain extensive coverage of APF in print, broadcast and on-line national and regional media.

- A. Cultivate 50 top health reporters in one-on-one sessions
- B. Mail "Intro to APF" kit to top tier media, and produce several mass mailings to media
- C. Produce ³four quarterly issues of APF Newsletter
- D. Establish list of professional and patient spokespersons and system to contact them in timely fashion
- E. Seek to place numerous stories in national and regional media on JCAHO, *Pain Action Guide*, APF's *Bill of Rights*, and *Stop Pain Now!* campaign
- F. Monitor news and react to high value stories as appropriate
- ☒ G. Begin promoting *Pain as the Fifth Vital Sign* project as resources allow

5. Initiate the *Stop Pain Now!* Grassroots Outreach Project

Goal: Successfully roll out the Stop Pain Now! grassroots outreach pilot project in Baltimore, and begin the rollout of similar projects towards the end of the year in two to four other major media markets.

- A. Prepare community action kits, including local media section.
- B. Build a local coalition, develop needed partnerships and hire part-time organizer.
- C. Conduct an initial pain survey and promote the results.
- D. Rollout pilot project in Baltimore, implement activities and evaluate.
- E. Initiate project in two other major media markets before the end of the year, including hiring part-time coordinators.

Purdue
THAT RIGHT

6. Propose Proactive Federal Legislation

Goal: Draft the outlines of a comprehensive legislative proposal to promote good pain management with the support of key partners.

- A. Develop a consumer-oriented outline of legislative ideas that may include:
 - Improving public awareness and understanding of pain issues
 - Reducing regulatory barriers to access to pain management
 - Increased support for research on pain
 - Promoting professional education of pain management
 - Increasing reimbursement for pain management treatments.
- B. Hire part-time government relations consultant to enable Interim Executive Director to focus intensively on fundraising.
- C. Build support among a broader coalition of partners (including but beyond the PRPA allies), and incorporate supportive ideas/changes.
- D. Continue to fight legislation harmful to people suffering pain. *or administration*
- E. Build grassroots advocates database of patients and health care professionals via current network, e-newsletter, web site, newsletter, etc.
- F. Have consensus proposal converted into legislative language and introduced by end of the year.

*Mandating pain tx in
federally funded health services*

7. Launch an APF Monthly "E-Newsletter"

Goal: Design and launch a consumer-oriented, free monthly electronic newsletter containing useful, relevant and up-to-date information summaries with hyper-links to full stories and related resources with mechanism to gather basic user info for APF database.

- A. Set up technology, including web site subscription and connections to database, to convert newsletter to electronic form.
- B. Summarize content from Nexis searches, vet medical information, and obtain copyrights.
- C. Distribute to all in database while promoting via marketing plan to greatly expand readership.
- D. Obtain feedback and improve subsequent editions.

HRC url to staff

8. Upgrade and Expand Patient Information Services

Goal: Provide timely, accurate and helpful information to consumer on a broader range of topics.

- A. Update existing materials and create several new pieces that are most requested by consumers (both in hard copy form and as reflected on web site), especially on issues relating to chronic, non-malignant pain.
- B. If final negotiations work out and proposal funded, become primary provider of patient information via internet, toll-free number and fulfillment as a tri-leader with the National Health Council and Partnership in Caring in the proposed *Taking Control of Pain* initiative.
- C. Reduce turnaround time for responding to requests.

9. Pursue NCQA Evaluation of Pain Management by HMO's

Goal: To assume the leadership role in beginning an effort to dialogue with NCQA on including pain management in criteria HMOs are measured by.

- A. Follow up on initial contacts with NCQA staff and committees
- B. Recruit American Pain Society, AACPI, and other partners to join in initial meetings.
- C. Begin work with NCQA and partners.

10. Develop the APF Board

Goal: Significantly diversify the Board by the end of 2001 and use the Board and Scientific Advisory Committee effectively.

- A. Recruit new Board members so that over 1/3 of the Board membership at the end of the year consists of non-medical consumer/patient representatives.
- B. Include leaders from non-APS organizations on the Board.
- C. Expand use of the Scientific Advisory Committee.

sharedinfo/op plan for 2001.doc

Translate PAg into Spanish

American Pain Foundation, Inc.
Profit & Loss Budget Overview
January through October 2001

	Jan - Oct	Annual Budget
Income		
Grant Income		
Corporate	316,414	575,000
Foundation	225,000	175,000
Organization		25,000
Grant Income - Other		
Total Grant Income	<u>541,414</u> ~12%	<u>775,000</u>
Individual Contributions		
Charter Supporter/Stop Pain Now	12,035	
Individual-other	4,315	35,000
Memorial	2,755	
Speaking Fees	3,353	
Stock Donation		
Individual Contributions - Other	10	
Total Individual Contributions	<u>22,468</u>	<u>35,000</u>
Investment Income		
Dividend/Interest-Investments	39,051	60,000
Gain on Sale of Investments		
Interest - Checking	105	
Unrealized Gains/Losses	2,255	
Total Investment Income	<u>41,411</u>	<u>60,000</u>
Material Sales		
Bill of Rights - Cards	260	
Bill of Rights - Poster	15,015	
Newsletter	45	
Pain Action Guides	31,644	
Material Sales - Other		25,000
Total Material Sales	<u>46,964</u>	<u>25,000</u>
Miscellaneous Income	2	
Total Income	<u>652,259</u>	<u>895,000</u>
Expense		
Consultant Expenses		
1 - Personnel		
Compensation		
Consultants (GR/Pain Mgmt)	14,896	20,320
Salaries	304,676	342,557
Temporary Service	794	1,000
Total Compensation	<u>320,366</u>	<u>363,877</u>
Employee Benefits		
Acquired Benefits	18,139	35,069
Garage & Transit	5,240	3,600
Health Insurance	4,893	
Life/Disability Insurance	-14	
Total Employee Benefits	<u>28,258</u>	<u>38,669</u>
Payroll Taxes		
FICA & Medicare	23,595	21,342
State Unemployment Insurance	2,041	
Total Payroll Taxes	<u>25,636</u>	<u>21,342</u>
Total 1 - Personnel	<u>374,260</u>	<u>423,888</u>

12:38 PM
11/19/01
Accrual Basis

American Pain Foundation, Inc.
Profit & Loss Budget Overview
January through October 2001

	Jan - Oct	Annual Budget
2 - Operating		
Board of Directors Expense		
Annual Board Meeting	2,366	
Miscellaneous Board Expenses	211	
Total Board of Directors Expense	2,577	
Communications		
Internet Fees	2,405	3,000
Telephone	11,815	24,000
Total Communications	14,220	27,000
Conference Exhibit/Regis/Ship	3,745	5,000
Dues/Subscriptions/Regulatory		
Charitable Registration	7,463	8,000
Dues/Subscriptions	4,388	2,500
Publications/Library		
Total Dues/Subscriptions/Regulatory	11,851	10,500
Insurance		
D & O Insurance	2,038	1,000
Workers Comp	1,053	
Total Insurance	3,091	1,000
Miscellaneous	154	1
Office Expense		
Bank Fees		
Classified Advertising	457	1,500
Equipment	1,489	21,000 ~30,000
Software		500
Supplies	7,204	5,000
Office Expense - Other	33	
Total Office Expense	9,183	28,000
Postage & Delivery		
Bulk Orders of Material	3,562	14,000
Individual Order/Other	9,404	10,000
Newsletter	3,965	6,000
Postage & Delivery - Other	2,918	
Total Postage & Delivery	19,849	30,000
Printing and Publications		
APF Materials		
APF Brochures		1,000
Bill of Rights - Card	7,612	10,000
Bill of Rights - Poster	3,723	
Other Education Materials	1,601	3,000
Pain Action Guides	40,541	40,000
Total APF Materials	53,477	54,000
Newsletters	10,795	18,000
Other		600
Change of Address Mailing	3,475	
Other - Other	787	
Total Other	4,262	600
Photocopies	1,992	2,000
Total Printing and Publications	70,526	74,600

yc
ie DSL
domain names

add liability
ins.

+ 1100 display boards
\$1,000 ea to
APF
Partnership for Caring

American Pain Foundation, Inc.
Profit & Loss Budget Overview
January through October 2001

	Jan - Oct	Annual Budget
Professional Development	879	800
Professional Fees		
Accounting Charges/Fees	5,538	5,500
Auditing Services	3,600	3,200
Computer/MIS	17,868	16,000
Design of Publication/Public Expenses	1,750	2,500
Legal Fees/Charges	3,122	13,200
Payroll Service	2,380	1,500
Total Professional Fees	34,258	41,900
Rent		
Office	38,423	38,500
Total Rent	38,423	38,500
Special Projects		
APF/SPN Media Campaign		35,000
Direct Mail Fundraising	7,176	12,100
Executive Search Firm	4,671	7,500
Stop Pain Now Grassroots		17,110
Total Special Projects	11,847	71,710
Travel Expenses		
Lodging	7,518	10,000
Meals	2,404	4,000
Travel	17,114	12,500
Total Travel Expenses	27,036	26,500
Website		
Website Development	7,138	25,000
Website Operation	1,906	1,500
Total Website	9,044	26,500
Total 2 - Operating	256,683	382,011
6999 - Void Checks		
Total Expense	630,943	805,899
Net Income	21,316	89,101