

Alzheimer's Association

Maine Chapter

Annual Report

Fiscal Year 2009



alzheimer's  association®

the compassion to care, the leadership to conquer

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Karen Stram

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2008-2009 was a year of change and challenge for the Alzheimer's Association, Maine Chapter, and also one of continuity and growth.

In August we welcomed Joyce Heptner, new Executive Director, who energetically began familiarizing herself with the organization, its staff and programs. When she was only a few weeks into the job, the worldwide economic downturn presented unexpected challenges. Under Joyce's capable leadership, staff achieved budget revisions and organizational restructuring, steps that have enabled the Chapter to operate cost-effectively, to offer its vitally important support services and educational programs without interruption, and to continue its active advocacy program.

The past year also was one of growth for the Maine Chapter. Many steps were taken to increase public awareness of the disease and the work of the Chapter. Staff increased service delivery through the Web, held a Public Policy State House Lobby Day for legislators, identified six Maine Alzheimer's Champions, and inaugurated an annual Champions' Breakfast which heralded Senator Susan Collins for her advocacy efforts for the disease.

The successes of the past year were made possible by the efforts of our professional and dedicated staff and also by the continued commitment to the Alzheimer's Association Maine Chapter over the years by our many volunteers and friends. Thank you for your past generosity. I hope we may continue to count on your support as we move ahead together to serve the many individuals, families, and caregivers affected by Alzheimer's disease and to support research efforts to find a cure for the disease.

Sherrie Bergman, Board President

Staff 2008-2009

Executive Director's Message

Executive Director
Joyce Ann "Joy" Heptner, DM

Director, Programs, Public Policy, & Public Relations
Kathryn Pears

Director, Finance, H. R. & IT
Laurie Trenholm

Education Specialist
Darlene Field

Senior Care Consultation
Robyn Berry

Manager, Development and Special Events
Sarah Stepp

Manager, Development and Special Events
Cathy McGuckin

Care Consultant / Helpline
Barbara Asnes

Office Manager
Drew Wyman

On August 4, 2008, I gladly joined the professional team of staff and board members of the Alzheimer's Association, Maine Chapter, having worked with the Greater Maryland Chapter for six (6) years.

By mid-September 2008, the economic climate in the country took a downward turn. The Chapter's board of directors, recognizing the impact these economic changes could have on the Chapter's financial position, took immediate corrective action to ensure the Chapter would remain financially viable and able to provide the expert quality programs and services for which it is known.

True to the staff's professional nature, all requests for programs and services were met. In fact, many programs grew. Two state conferences were held in the state: Bangor in the fall and Portland in the spring. The number of support groups across the state increased. Additional educational programs for professional paid care providers, family members, and community members were added to the Chapter's schedule.

As the audited financial summary in this report shows, the Chapter ended Fiscal Year 2009 with a net surplus. Best of all, the Chapter staff and volunteers maintained and in some cases increased the number of services provided to the people who need these services in the great State of Maine.

The Maine Chapter remains strong thanks to our Board of Directors, staff members, volunteers, and generous donors and corporate sponsors. We continue to strive toward a world without Alzheimer's disease. In the meantime, you can depend upon the staff and volunteers of the Chapter to be here when you need us.

Dr. Joy Heptner
Executive Director

Mission

To eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health.

Selected Highlights Fiscal Year 2009

Education and Training

- Received a three (3) year grant from the Administration on Aging and the Maine Department of Health and Human Services to provide an evidence-based caregiver training program in seven (7) counties across the state.
- Received a three (3) year grant from the Borman Foundation to develop a webpage geared toward professional caregiver education.
- Presented a fall conference in the Bangor area to an audience of 180 family and professional caregivers.
- Presented the annual spring conference on end-of-life care and issues in Portland to an audience of more than 200 family and professional caregivers.
- Delivered our highest level ever of fee-for-service educational programs.
- More than 40 support groups assisted families in 13 counties across the state.
- In FY 2009 the Maine Chapter provided Helpline assistance to families in all 16 counties of the state.

Programs and Services

- Care providers and people with dementia illnesses in the state's 16 counties accessed the services of the Alzheimer's Association during Fiscal Year 2009.
- The toll-free Helpline and Care Consultation Programs, available 24 hours a day, 7 days a week, addressed issues raised by 3,638 individuals living with Alzheimer's disease and those who care for them.
- The Family Care Consultation program, administered by an employee with a Master's in Social Work, provided guidance in developing and implementing 1,678 care plans for people who have dementia.
- The Information and Referral program, administered by trained staff members and volunteers, provided assistance to 1,960 family members, care providers, and people with dementia.
- Eighteen (18) trained, monitored, and supervised volunteers — many of whom are or were caregivers — helped 1,217 callers learn how to address care giving issues or find needed assistance.
- Volunteers covered more than one-third of the Helpline calls received during Fiscal Year 2009.

Public Policy and Advocacy

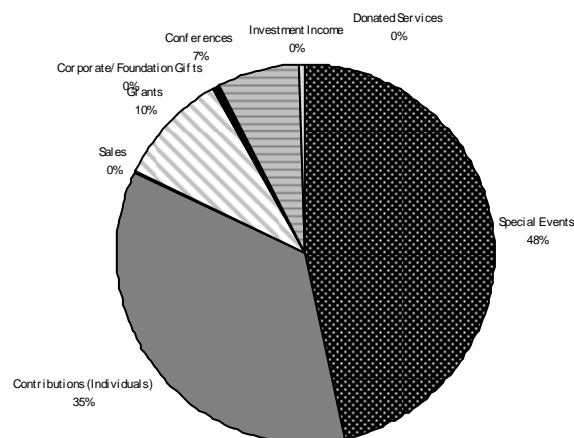
- Chapter staff presented testimony and advocated on behalf of people who have Alzheimer's and their care providers on 12 pieces of legislation that had a direct impact on individuals with dementia.
- The Chapter's Public Policy Director was named by the Commissioner of the Department of Health and Human Services (DHHS) to a task force examining ways to redesign Maine's long term care system.
- Chapter board members and advocates Carol Calcagni and Karen Stram attended the Annual Public Policy Forum in Washington, D.C. They met with members of Maine's Congressional delegation and advocated for increased research funding.

"Highlights" continued on pg. 8

Statements of Financial Position
June 30, 2008 and 2009

<u>ASSETS</u>	<u>2009</u>	<u>2008</u>
CURRENT ASSETS:		
Cash	\$ 37,281	\$ 73,947
Promises to give	70,450	77,835
Grants and other receivables	99,331	35,567
Prepaid expenses	1,985	4,237
Inventory	2,804	2,841
Total current assets	211,851	194,427
FIXED ASSETS:		
Furniture and equipment	92,404	89,809
Less accumulated depreciation	79,097	72,378
Net fixed assets	13,307	17,431
OTHER ASSETS:		
Security Deposit	3,160	3,160
	\$ 228,318	\$ 215,018
<u>LIABILITIES AND NET ASSETS</u>		
CURRENT LIABILITIES:		
Accounts payable	\$ 15,462	\$ 41,987
Accrued payroll and payroll taxes	40,433	15,129
Line of credit	-	52,000
Sales tax payable	37	80
Total current liabilities	55,932	109,196
NET ASSETS(DEFICIT):		
Unrestricted	62,415	(17,070)
Temporarily restricted	109,971	122,892
Total net assets	\$ 228,318	\$ 215,018

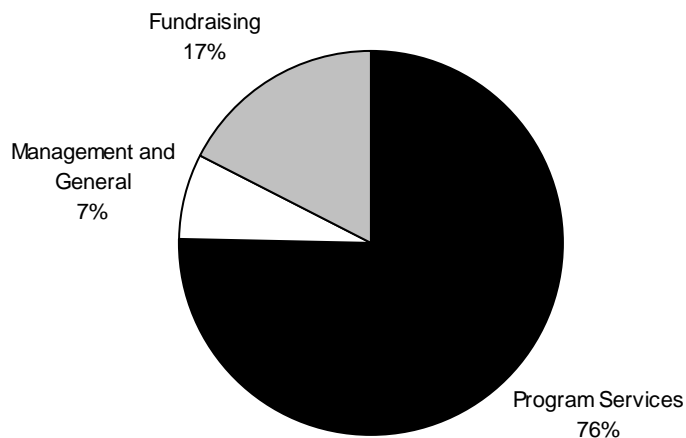
Income Summary - July 2008 through June 2009



Statements of Activities and Changes in Net Assets
Years Ended June 30, 2008 and 2009

	<u>2009</u>	<u>2008</u>
	<u>Total</u>	<u>Total</u>
REVENUES:		
Direct public support:		
Contributions	\$ 255,089	\$ 335,651
Memorials and bequests	63,416	75,649
Indirect public support:		
AoA grants	61,253	10,000
Other grants	25,000	19,500
Conferences	62,658	51,965
Membership dues	1,575	1,355
Fund raising events	458,294	452,659
Less costs of direct benefits to donors	(40,187)	(32,348)
Net revenues from fund raising events	<u>418,107</u>	<u>420,311</u>
Interest and dividends	1,307	2,366
Sales	3,505	5,163
Donated services	4,371	11,535
Total revenues	<u>896,281</u>	<u>933,495</u>
EXPENSES:		
Program services	624,534	726,052
Management and general	60,202	66,485
Fund raising	144,981	153,536
Total expenses	<u>829,717</u>	<u>946,073</u>
Changes in net assets	66,564	(12,578)
NET ASSETS, BEGINNING OF YEAR		
	<u>105,822</u>	<u>118,400</u>
Net assets, end of year	<u>\$ 172,386</u>	<u>\$ 105,822</u>

Expense Summary - July 2008 through June 2009



Honor Roll of Donors

Leadership Circle Discoverer

(\$50,000 to \$99,999)
Hunter Mahan

Leadership Circle Pacesetter

(\$10,000 to \$24,999)
Borman Family Foundation
Kindred Health Care
Martin's Point Healthcare
Priscilla Rowe and James A. Rowe
A.R. and Marylouise Tandy Foundation Trust
John Wasileski

Alois Society Partners

(\$5,000 to \$9,999)
Beacon Hospice
Genesis HealthCare
John and Pauline Guth
Highland Retirement Community
George M. & Maribel Lord
Pine Tree Quilters Guild
William B. and Anne H. Russell
Samuel L. Cohen Foundation

Alois Society Members

(\$1,000 to \$4,999)
Allegiance Hospice Care of Maine, LLC
Aident, LLC
Allied Engineering
Anonymous
ASG Risk Management, Inc.
Atlantic Landscape Construction, Inc.
Atria Kennebunk
Bangor Daily News*
Bangor Hydro
Bangor Savings Trust
Bankers Life and Casualty
Forget-Me-Not Golf Tournament
The Barber Family
Barber Foods
Charlotte Bordeaux
Bath Savings & Trust Company
Bath Savings Institution
Birch Bay Village

Mark and Toni Butterfield
Robert and Carol Calcagni
Homewood Benefits
Camden National Bank
Carey & Company, P.C.
Charlie and Julie Cawley
Central Maine Long Term Care
Bolster Heights
Central Maine Medical Center
Jean M.B. Chapman
Dr. Laurel and Stephen Coleman
Rodger and Rebecca Cuthbert
R. Mal and Michele Davis
R.M. Davis, Inc.
Delta Dental Plan of Maine
James and Julia Dougherty
Downeast Energy Building & Supply Co.
Estate of Doris Hissom
Norvelle and Ruth Fatscher
Jabbar Fazeli, M.D.
Maine Geriatrics
First Atlantic Healthcare
Amy Fuller
Genworth Financial
Peter and Kim Gore
Leon and Lisa Gorman
Al and Natalie Graceffa
Louise Hardie
Thomas and Anita Hart
Harvard Pilgrim HealthCare
Dermot and Maryellen Healey
The Highlands LLC
Daniel W. Hildreth
Ted and Betsy Hillman
Home Instead Senior Care
Hopkins & Abbondanza
Sharon L. Horne
InterMed
JHA
Kennebec Valley Radiology Professional Association
L.L. Beane, Inc.
Peter & Kay Leslie
Maine Biotechnology Services, Inc.
MaineGeneral Rehab and Nursing
Maine Health Care Association

Maine Medical Center/Maine Health
Maine Veterans' Homes
Maine Veterans' Homes Employees' Association
Marshall & Libby, LLC
The Martin Foundation
Robert and Brenda McLean
MEMIC
Mercy Hospital
Mid Coast Senior Health Center
Monarch Center
Nale Law Offices, LLC
John Nale, Esq.
Mark Nale, Esq.
North Country Associates
OceanView Retirement Community
Parrot Head Club of Maine
Lynne Peters
Pfizer Inc.
Pike Industries
Pine State Trading Co.
Paul Richardson
John M. Robinson Fund of the Maine Community Foundation
Cornelia Robinson
David Rockefeller
Ross Manor
Brett and Susan Seekins
Seventy-Five State Street
Spectrum Medical Group
Springbrook Nursing Center
St. Andre Health Care Facility
Dr. Katherine Stoddard Pope and Chris Harte
Karen Stram
John Thibodeau
Time Warner Cable
Village Crossings at Cape Elizabeth
James and Mary Lee Parker
Ward
Eric and Tracy Weinrich
Whitney Campbell *
Whitney Campbell & Co.
Charles D. Whittier II
Fiorella Williams
Wright Express
York Hospital

Members

(\$500 to \$999)
AARP Maine
Access Transportation, Inc.
Aetna, Inc.
Doug and Elizabeth Andrews
Androscoggin Home Care and Hospice
Androscoggin Trust and Investment Services
Anthem Blue Cross and Blue Shield of Maine
Barbara Asnes and Stuart Bratesman Jr.
Baker, Newman & Noyes
Catherine F. Bass §
Bay Square at Yarmouth
Sherrie Bergman and Donald Quaid
Jonathan Bernier
Bluewater Energy Solutions, Inc.
Capozza Tile Co.
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Madeleine G. Corson
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David and Shauna Damboise
Joel Davis
Joel Davis and Associates
Dr. Steven E. Diaz
Bruce and Clarice Dickinson
Eastern Maine Healthcare System
Cynthia M. Faulkner
General Dynamics
Employees Community Action Committee
Eleanor J. Goldberg
Jeff and Cathy Goss
Linda Haines
Nathan Hawkins
Gail Haynes
Heartworks Home Referrals
Lindsay Henderson
Lindsay Henderson Interiors
Hewes Company, LLC
John and Gale Hichborn
Hospice of Southern Maine
InterMed
Vincent and Evelyn Kirschner
Knights of Columbus #106

The Alzheimer's Association, Maine Chapter Board of Directors and staff members gratefully acknowledge the generosity of our donors. Gifts are received throughout the year as memorials to loved ones, tributes in recognition of special events such as birthdays and weddings, project support, and grants to name a few.

Deane and Cynthia Lanphear
John Macauley
Harry Madeira Sr.
Sean and Jennifer Mahoney
Maine Health Access
Foundation
Maine Medical Association
Paul and Patricia Marshall
Daryll and Patricia Mayeux
Rose McCloskey
Morgillo Financial
Management, Inc.
Mt. Desert Island Hospital
National Semiconductor
Charles and Alexa
Oestreicher
Suzi Osher
Michael and Margo Pearson
Pfizer, Inc.
Portland Pirates, LLC
Sarah Russell and Joseph
Reynolds
James Rhoades
Rosscare
Saco & Biddeford Savings
Institution
Sanford Institution for
Savings
Sedgewood Commons
Spectrum Generations
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Terranova Corporation
Toole, Carlin & Powers, P.A.
Rachel Turcotte
Andy and Gale Tureff
Wal-Mart Foundation
Alan B. Van Wert
Ernest and Susan
Whitehouse
Fiorella Williams
Susan Woodbury
Zachau Construction, Inc.

Friends

(\$250-\$500)

Advantage Home Care
Paul S. Allen
Aroostook Medical Center
Alice Atkins
Bar Harbor Rotary Club
Bay Wrap
Bill Boeschenstein Jr.
Susan Bradley
Laura Byrne
Maureen Callnan

Clark Associates
Coastal Consulting Services
Roxanne Cole
Comfort Keepers
Patricia A. Crowley
Cumberland Farms
Dairy Queen Auburn
Edward Darling
Lori A. Desjardin
Dirigo Pines Development
Company, LLC
Stephen and Sharon Dunlap
Robert C. Eldredge
Family of Adela Dube
Cloutier
Michelle Fern
First Lady, Inc.
Don Foshay's Discount Tire
& Alignment
Franklin Savings Bank
Charles and Nancy Gaunce
Dr. and Mrs. Thomas
Grogan
Kate Russell Henry
Joyce Heptner
John and Linda Hillman
Patricia House
Dana Hoyt
David and Diana Ireland
J.C. Milliken Agency, Inc.
Edward Jones
Kaprzak Homes, Inc.
Earle and Mary Ladd
Dale Lalone
Lori Lepauloue
Lavalley Lumber
Lipman, Katz & McKee, PA
mWave Industries
Dan Maguire
Mega Industries
Millipore Corporation
Joyce Mitchell
Mark and Laurie Nale
Robert and Jill Neshier
Neurology Associates of
Eastern Maine
Norman, Hanson & DeTroy
Norway Savings Bank
Jerrold Olshan and Lynn
Urbach
Frederick and Suzanne Pape
Jr.
Phillips-Strickland House
Piper Shores
Rosemary Price

Patricia Nelson-Read
Janet Richardson
Kenneth and Susan Ross
Alan and Barbara Saabye
Safe Handling, Inc.
Anthony L. Schaeffer
Howard Schultz
Seaside Healthcare
Henry Shepherd
Shop'N Save, Cornish
Southern Maine Medical
Center
Charles and Ann Spaulding
St. Mary's d'Youville
Pavilion
Steve and Renee's Diner
Summit of New England
Thurton and Peters
Sugarhouse
United Ambulance
Verso Paper
Victorian Rehab & Living
Center
Emery Waterhouse
Whited Ford Truck Center
Geraldine G. Wolf
Woodland Valley Disc Golf

Challenge for Hope: \$10,000 Over Four Years

In Honor of Robert Stram
from:

Karen Stram
Kennebec Valley
Radiology

In Memory of Hazel
Livingwood Allen from:

Nancy Harding
Robert and Susan
Grondin

In Memory of Julia Bishop
Hillman from:

Ted and Betsy Hillman
James and Julia
Dougherty
Charles Hillman
John and Linda Hillman

In Memory of Lawrence Darr
Chapman from:

Michael and Margo
Pearson

In Honor of the Leslie Family
from:

Peter and Kay Leslie

Third-Party Fundraisers July 1, 2008 through June 30, 2009

- Bankers Life and Casualty Forget-Me-Not Golf Tournament
- John Benoit Poetry Chapbook—*The Brown Nosed Camel*
- Highland Greens Golf Tournament
- Parrot Head Club of Maine

Founder's Society

Ms. Janet E. Cole
Mr. Normand J. Cote
Mr. Harry B. Eddy *
Peg Gagnon
Ted and Betsy Hillman
John Mauro
Kathryn G. Pears
Mrs. Sonia Tracy
Eleanor R. Vincent
Ms. Mildred D. Webster
Mrs. Carol S. Whitehead

* Deceased

League of Supportive Organizations

Atria Kennebunk
Birth Bay Village
St. Andre Health Care
St. Mary's d'Youville
Pavilion

Selected Highlights Fiscal Year 2009 (continued)

Development

- Memory Walk 2008 raised more than \$325,000 in support of the Chapter's mission. In 15 sites across the great state of Maine more than 1,500 participants formed 210 teams that joined the Walk to End Alzheimer's.
- The Fifth Annual Eric Weinrich Charity Golf Tournament and Auction took place in July 2008, raising more than \$55,000 for the Chapter.
- Awareness and funding for the Maine Chapter's services were raised through events such as;
 - Stars of Hope program at OceanView, Falmouth, The Highlands, and Highland Green
 - Bankers Life and Casualty's Forget-Me-Not Golf Tournament
 - Gov. Baxter's School for the Deaf's "Empty Vessel Event"
 - Mark & Laurie Nale's House Party
 - Lori Desjardins' Fourth of July Party
 - John Benoit's Poetry Chapbook Sales
 - New England Parrot Heads Convention
- The Founder's Society, individuals who are leaving a planned gift to the Maine Chapter, added three new members to its ranks.

Challenge for Hope

Individuals donating to a 'Challenge for Hope Fund' commit to a cumulative gift of \$10,000 given in \$2,500 annual increments over a four-year period. In many cases, family members have joined together to create a Challenge fund that is supported by contributions made by family and friends. Challenge funds both honor and memorialize loved ones.

We are pleased to recognize active Challenge for Hope funds and donors.

In Honor of Robert Stram
Karen Stram

In Honor of Robert Stram
Kennebec Valley Radiology Professional Association

In Honor of Hazel Allen
Susan Grondin
Nancy Harding

In Memory of Lawrence Darr Chapman
Jean Chapman
Gail Chapman Close
Lindsay Henderson

In Honor of Julie Bishop Hillman
Julia and James Dougherty
Charles Hillman
John and Linda Hillman

Margo and Michael Pearson

Champions Campaign Launched

- Champions are individuals who contribute to the forward movement of the Chapter's mission by being our voice in the community and taking action to end Alzheimer's disease. The Maine Chapter launched the Maine Champion's program in Fiscal Year 2009 acknowledging six (6) Maine Champions: Senator Susan Collins, Marylouise Tandy Cohen, Eric and Tracy Weinrich, and John Wasileski.
- The Inaugural Champion's Breakfast was held at the Eastland Park Hotel on May 27, 2009. Honoring Senator Susan Collins and remembering her aunt, Marylouise Tandy Cohen, this first-time event raised more than \$40,000 and attracted a sellout audience.