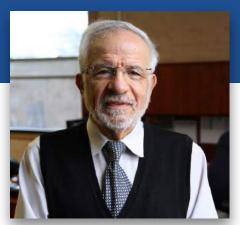
Community Hope Engagement Trust Youth Care Believe TeachValues Leadership Growth Families Innovation Stren Strength



NORTH AMERICAN FAMILY INSTITUTE

2018 Annual Report



Dr. Yitzhak Bakal President & Founder North American Family Institute

President's Welcome

RESILIENCE, STRENGTH & GROWTH

We are pleased to present our 2018 annual report, which provides a high level overview of the continued and well-planned growth of NAFI/NFI's diverse array of programs and services, across nine states. This year, we have had the privilege of helping close to 9000 youth, adults and families advance towards achieving their behavioral health and life goals.

These progress reports from across the agency also illustrate the ongoing changes taking place in the field of human services, including the increasing demands of state funding agencies. To accommodate and even stay ahead of these shifting requirements, we have tried to anticipate changes, inspiring us to lead the way. Our decentralized, regional structure, coupled with our diverse and multifaceted approach to service delivery continues to help us listen to and address local needs while staying nimble and responsive. As a result, our work has been noted for its creativity and innovation while always keeping our consumers front and center. To the credit of our leadership and staff, we also have established a strong reputation for producing excellent outcomes, earning the respect and trust of funding authorities. In fact, state officials often turn to us for new and innovative problem solutions, knowing they can trust us to support and drive new initiatives.

Our leadership team is a strong reason for our continued success. Quality leadership attracts quality employees, all guided and nourished by the Normative Community Approach. As the economy improves, we face the challenge of recruiting and retaining new qualified staff. This challenge is one we previously encountered and I am confident that the uniqueness of our work and work environment will make the successful recruitment of dedicated and committed personnel a reality. In the past few years, the NAFI/NFI organization has repeatedly been voted a "Best Place to Work," and we congratulate those teams on this accomplishment. We are anchored by a value-based philosophy that emphasizes the importance of engaging and empowering all stakeholders to partner in building healing community environments. We view it as an opportunity to build communities where mutual support and help are encouraged and celebrated. Community building is a strategy we have employed to launch early intervention and prevention programs for entire neighborhoods. Our organization is leading the way in making such an approach a reality. As the pages that follow demonstrate, we continue to take calculated risks to maximize opportunities for our consumers, learning and innovating as we seek new and effective ways to honor the vision, mission and core values that unify us.



Best wishes,

Y, Hahar Balla

Our Story: NAFI/NFI

WHO WE ARE

North American Family Institute is a private, nonprofit human services agency specializing in community-based care for children, adolescents, adults and families with mental and/or behavioral health needs.

Since 1974, we have provided programming and services designed around the Normative Community Approach, which emphasizes the ability of all people to achieve positive change when they are members of a community united in mission and purpose.

Founded 44 years ago in Massachusetts, the agency is now comprised of our parent corporation (NAFI) and four subsidiaries: NFI Massachusetts, Inc., NFI North, Inc. (Maine and New Hampshire), NFI Vermont, Inc. and NAFI Connecticut, Inc. (Connecticut and Rhode Island).

Within NAFI, are the New York and the Southeast Regions (Florida). NAFI also operates Youth Link, a prevention and early intervention services division and Homecare Choices, which provides in-home, senior care across Cape Cod. Collectively, we are known as NAFI/NFI.

WHAT WE DO

NAFI/NFI operates a coordinated network of 100+ programs encompassing the following categories:

- ▶ Behavioral Health
- Community-Based
- Foster Care
- Juvenile Justice
- Educational/Vocational Services
- Prevention /Early Intervention

NAFI/NFI's decentralized approach to service delivery allows us to best meet the diverse needs of our consumers, students and residents in order to increase the likelihood of success.

What unites us, regardless of location, is our shared mission:

Creating Diverse and Innovative Services For People



NAFI/NFI's history is rich with individualized, mission-driven programming designed to help consumers develop tools for their brightest possible future. For us, that means holding true to our values across our organization, while allowing for the necessary nuances and differences across our operations. In fact, much like with our stakeholders, at NAFI/NFI, we celebrate the unique strengths, talents and expertise found in the threads that make up our agency, all the way from Maine to Florida.

'NAFI/NFI's history is rich with individualized, mission-driven programming designed to help consumers develop tools for their brightest possible future.'

WHAT WE BELIEVE

We believe in service delivery that is localized and in line with the needs of the community. We believe people can change. We believe in respect, dignity and listening to the voices of those we serve. We believe in educational and vocational preparedness. We believe in empowering individuals and families to make a more positive future. We believe in support. We believe in our team. We believe in honoring the unique strengths and gifts of all individuals. We believe in the power of community.

Left: NAFI/NFI leaders celebrating at the 2018 NAFI/NFI Annual Conference

NAFI OFFICERS

Howard Rich, Chairman of the Board Pamela Rocha, Treasurer Dr. Barbara Vinick, Clerk Holly Roy, Assistant Clerk

NAFI BOARD OF DIRECTORS

Dr. Nancy Grossman Dr. William Madaus Roger Marcorelle Howard Rich Dr. Jackie S. Rosario Dr. Matthew Sagal Dr. Katherine Turner Dr. Barbara Vinick Barnet Weinstein James Zafris Margaret N. Zusky



Steve Hahn, Dr. Chuck Myers, Dr. Yitzhak Bakal and Dr. Jackie Rosario



Above: NAFI/NFI Executives with Dr. Bakal at the 2018 NAFI/NFI Annual Conference

EXECUTIVE OFFICERS & DIRECTORS

Dr. Yitzhak Bakal, President and Founder Hildegarde Paris, **Chief Operating Officer** Pamela Rocha. Chief Financial Officer Eric Sheehan, J.D., Chief Administrative Officer Lynn Bishop, Executive Director, NAFI Connecticut/Rhode Island Dr. Paul Dann, Executive Director, NFI North Steve Hahn. Executive Director, NFI Massachusetts Dr. Chuck Myers, Executive Director, NFI Vermont Jay Paris, Director, Youth Link, Director, Development and Services Ayeshah Parker, Regional Director, NAFI New York Dr. Daniel Rosenn, Medical Director Deborah Yates. Regional Director, NAFI Southeast

NAFI/NFI STAFF DEMOGRAPHICS Total Employees: 1632

Females	1085	66%
Males	547	34%
Employment Status		
Full-time	1154	71%
Part-time (Includes Relief)	478	29%

Employees by Region/Corporation

	-	
NAFI Connecticut/Rhode Island	366	22%
NAFI Corp	26	1%
NAFI Homecare Choices	27	1%
NFI Massachusetts	515	32%
NAFI New York	38	2%
NFI North	347	21%
NAFI Southeast	8	<1%
NFI Vermont	302	19%
NAFI Youth Link	3	<1%
Employees by Length of	Service	
Less Than 1 Year	433	27%
1 to Less than 2 Years	324	20%
2 to Less Than 5 Years	432	26%
5 to Less Than 10 Years	215	13%
10 Years and More	228	14%
Employees by Ethnicity		
White	1038	64%
Black	194	12%

153

19

3

1

43

181

9%

1%

<1%

<1%

3%

11%

Hispanic

2 or More Races

Not Specified

American Indian or Alaskan Native

Native Hawaiian or Pacific Islander

Asian

At a Glance





Above: Staff from NAFI Corp and NAFI Rhode Island at the Annual Conference

2018 Review

NAFI CONNECTICUT, INC.

Connecticut

As always, NAFI CT truly appreciates and honors the foundation of our company – our staff. There were many nominees and noteworthy accomplishments across the State this year and the following staff were awarded the following at our Annual Staff Day for their outstanding work and leadership:

Lisseth Jurado – Employee of the Year for Community Based Services

Nell Smith – Employee of the Year for Group Homes

Theresa Gonzalez – Employee of the Year for Girls' Residential

Willmely Rivera – Rookie of the Year

Heather Kalin – Executive Director's Award

Beginning in 2017 and continuing to excel, NAFI CT forged a partnership with Goodwin College to provide youth with specialized, career enhancement experiences. Funded by the Department of Children and Families, this program currently runs in cooperation with the Touchstone School and has an



Above: NAFI CT Goodwin Program

overarching goal of helping students draw a direct connection from academic success to positive outcomes for career and college readiness. The partnership allows students to work with college professors to learn soft skills needed to be successful in both the classroom and the workplace. Simultaneously, students gain exposure to a range of career possibilities through hands-on activities such as virtual welding, laser etching, and 3D printing. Since implementation, participants have demonstrated a 108% increased academic improvement compared to the previous school year. Students who stayed for the entire school year averaged an improvement of 2.3 grade levels in Math, and 2.4 grade levels in Reading. There has been a 63% reduction in students qualifying for truancy through June. It is an inspiring collaboration for all.

With some significant changes in CT's Juvenile Justice / DCF systems, so came changes to our programs. Although highly successful on all accounts, NAFI CT's FREE Program will be closing its doors as of December 31st and we are sad to see this impactful program be eliminated as an option for our young adults. On a positive note, NAFI CT was also awarded two new contracts of MST – EA services as well as an evidence-based foster care program, Therapeutic Foster Care of Oregon (TFCO) which will be up and running come the new year. With the competition for contracts so strong in these fiscal times, it is truly a noteworthy testament to the work and reputation of the current staff and leaders of our MST and Foster Care programs!

Rhode Island

NAFI RI held our annual Staff Appreciation Day on September 11th to recognize all of the hard work and dedication of our team. As a human services agency, our staff are our most valuable

resource, often working long hours with complex cases. Our day focuses on honoring our staff and their accomplishments over the past year, and offers employees a day for self-care and relaxation. Held at the Bristol Yacht Club, approximately 100 of our employees were able to attend this fun filled day, which included yard games, boat rides, great food and staff awards. Each Program Director also acknowledged those staff not able to attend with small gifts of appreciation within the programs. This year, we presented four Awards of Excellence along with the Executive Director Award:

Awards of Excellence

Tamyra Rico – Foster Care Clinician – Professional Parent Program

Kristine Bouthillier – Foster Care Case Manager – Professional Parent Program

Stephanie Calise – Residential Supervisor – Main Street Program

Chelsea Martini – Clinician – Enhanced Outpatient Services

Executive Director Award

John Basiliere – Director of Information Services for RI

NAFI RI is excited about a new agency-wide project, which focuses on continuity across programs utilizing our electronic health record. Volunteers from each program formed a committee, led by John Basiliere, to review paperwork, assessments and learn more about the system and all it has to offer. With representation from each program, the committee will develop assessments to be used across programs to offer more effective continuity of records, as well as outcomes and tracking of useful data. Currently, the committee is working on streamlining and implementing intake paperwork across programs.

Throughout this process, committee members are being educated on becoming system administrators, easing workflows and increasing efficiencies.

NFI MASSACHUSETTS, INC.

Community Support

In our work, sometimes we are called to reach beyond our immediate programs and serve as resources to the larger communities in which we live. For example, NFI's Family Resource Center (FRC) in Lowell stepped up to respond to the needs of many evacuees who were displaced to the Lowell area by the ravages of Hurricane Maria in Puerto Rico. Open to all individuals and families in the Greater Lowell area, our FRC provides a wide range of services to youth and families including education and career support, mental health counseling and Child Requiring Assistance (CRA) support. In addition to its work serving Massachusetts residents, the FRC helped evacuees register with FEMA for disaster benefits and provided critical case management support to them. This included connecting those looking for employment with career centers, school enrollment, connections with local nonprofit organizations for donated goods and collaborating with regional housing agencies and community action programs to access host families and temporary shelter options. NFI's program received a citation from the Governor of Massachusetts for its efforts to provide exceptional support to these individuals. Most recently, the FRC was again tasked with an emergent situation when they needed to assist with housing, schooling and sheltering of

Above: NFI Massachusetts Leadership

families displaced by gas explosions in nearby Lawrence.

Best Practices

NFI Massachusetts consistently seeks to remain a "learning organization", embracing emerging best practices in our field. In addition to our ongoing work to address the needs of youth with complex trauma through implementation of the ARC clinical model, NFI has turned its attention to the issue of permanency. Unfortunately, a number of youth "age out" and leave the human services system of care with no permanent adult connections in their lives. Research clearly shows that the long-term outcomes for such youth are very poor. During the year, NFI Massachusetts was accepted into a learning cohort of several other providers interested in adopting permanency practices in their organizations. Having completed an organizational "readiness assessment", NFI will receive a year of free training and consultation in the adoption of best permanency practices within the field.

New Programming

NFI was awarded a new Revocation program funded by the Department of Youth Services. Located in Amesbury, the short-term residential program serves court involved adolescent boys who have violated their grant of liberty and are placed back in a staff-secure program. The new program, called PIVOT, focuses on those behaviors that led to their freedom being revoked, provides the necessary treatment interventions to address those attitudes, evaluates the future risks and needs of each boy and prepares them for successful re-integration into the community.

Leadership Changes

Finally, there were some significant leadership changes during the year. Chris Tuttle, Director of Operations, left NFI in April and was replaced by Eric Klingaman. With over 20 years of experience in the field of human services, Eric began his work at NAFI Rhode Island and joined NFI Massachusetts in 2014. Most recently serving as Director of Behavioral Health, Eric is a proven manager with a thoughtful leadership style. Also, Lydia Todd has returned to NFI! Lydia served as NFI's Assistant Executive Director for 16 years before leaving in 2016 to become Deputy Commissioner of the Massachusetts Department of Probation Services. An exceptional leader who is respected both within and outside the agency, she has hit the ground running and been warmly welcomed back to the NFI family.

NFI NORTH, INC.

NFI North is proud to announce that it received the Best Place to Work Award for both Maine and New Hampshire. As a part of the process, employees responded to



Above: Karen Cusano, Champion for Children's Behavioral Health Award with Alyssa Nickerson and Steve Norton



a detailed survey, and as a result, the organization scored in the 90th percentile for having a positive organizational culture, as well as the ability to engage and develop employees at all levels.

The Agency expanded its transitional housing services with mental health needs from 47 to 67 beds across New Hampshire and, as a result, has been recognized for its ability to help individuals transition successfully into their own homes and communities.

NFI North also became the Care Management Entity (CME) for New Hampshire's Bureau of Children's Behavioral Health and, with this new status, NFI North will now provide essential care coordination, utilizing an evidenced-based model to hundreds of children, youth and families across New Hampshire.

Our annual Empowerment Luncheon attracted more than 230 participants and we were honored to have a graduate of our services, Michael Allen provided the key note address. Michael is now a professional chef and is emblematic of the thousands of people served by the organization each year.

NFI North continues to be a leader within the field of behavioral heath and social services as seen by the way in which team members across the organization are working to make a difference in the lives of the people we serve. As an example, Jill Allen, Regional Director for Maine's services, was elected to her tenth term as the President of the Child and Family Provider Network and Karen Cusano, Assistant Executive Director for NFI North, received the Jennifer Wierwille Norton Memorial Award for being a champion of children's behavioral health.

NFI VERMONT, INC.

In FY18, NFI Vermont provided services to 2012 youth and their families through our 19 programs. NFI schools served 193 youth, while 1819 youth participated in trauma informed, community based, intensive, mental health services. We served more young children than ever before. Close to 55% of youth served were 12 years old or younger, making them our largest population. NFI Vermont had, for many years, primarily served adolescents and their families. Serving younger and younger children is a multi-year trend identified several years ago, and one we understand as a response to the intense stress these families experience. The stresses include Adverse Childhood Experiences (ACES) of younger children as well as issues exacerbated by concerns in our society like food and housing insecurity and the opiate epidemic.



NFI Vermont provides intensive adolescent mental health services through an at-risk, outcome based, bundled payment contract. This is a new funding model highlighted as best practice in payment reform discussions. Through this contract, NFI served 30% more youth than we were required to serve, 130 rather than the targeted 100, while providing cost savings to our funders. This is an outstanding example of using the new concepts of payment reform to cost effectively enhance our services. Our length of stay has also decreased by 29.9% in the last four years to 377 days. We are proud to report that at discharge, 83% of consumers were transferred to the same level or a lower level of care.

New Program Initiatives

<u>Hospital Diversion</u> NFI opened a new Southern Hospital Diversion Program in Brattleboro. This program is a collaborative, operated by NFI and the local mental health center, Healthcare and Rehabilitative Services (HCRS). The program occupies a turn of the century Victorian farm house that was remodeled to optimize the space for the crisis stabilization and treatment planning services offered to the six male and female youth served at the program.

Child-Parent Psychotherapy NFI partnered with Easter Seals Vermont to conduct the first state-wide Training Collaborative of the Child-Parent Psychotherapy Model (CPP). CPP is a trauma-informed, evidence-based, in-home family therapy technique specifically designed for children from birth to six years old. The state-wide training collaborative is the first of its kind and had 32 participants, including private practice therapists as well as publicly funded clinicians.

Organizational Trauma We continued to focus on the impact

Left: NFI VT's new Hospital Diversion Program of trauma and ACES on organizations and received training in the Trauma Transformed model of trauma training for organizations. Trauma Transformed was developed by several trauma experts in the San Francisco Bay area. The focus is to support organizations in becoming "Healing Organizations" by understanding the impact of trauma and identifying processes and activities to mitigate the impact of trauma.

NAFI NEW YORK

In keeping with this year's Annual Conference theme, NAFI New York continues to demonstrate growth and 'resilience' in the face of challenges and opportunity. From all sides, 2018 brought on evolution, positioning NAFI NY to make an ever more enduring impact on the lives of families. Crafted upon the successful model of the Westchester and Nassau Family Wraparound Preventive Programs, Orange County's Family Wraparound Program celebrated its first anniversary by supporting the preservation of households and avoiding out-of-home placements.

As Director of Preventive Programs in Orange County, Sheena Sukhai-Alvarez and her team were honored as Spirit of the Community awardees, for the terrific work of this important program. In addition, the Wraparound Therapeutic Foster Care Program saw an unprecedented number of youth achieve permanency. Under the leadership of Director of Wraparound Programs Funmi Taiwo, and with the support of her team, nine children achieved permanency by way of adoption or a return to the care of their biological families. Each of these experiences helped us to grow and taught important lessons, even adapting to difficult decisions, including the discontinuation of our Preventive Program in Monroe County, as well as our Care Management program in Westchester County.

If growth is a choice made again and again, then it is never by chance, but instead, a result of forces working together. As we continue to keep pace with the state's implementation of Managed Care for youth in foster care, we have teamed with our Corporate office and NAFI CT colleagues on a Transformation Team, in an effort to ensure success in this vital regional restructuring. All of these strides were built upon the foundation laid by NY's outgoing Executive Director, Dr. Jim Isenbera, Jim's transition into retirement has paved the way for the region's next generation of leaders, each an embodiment of the confidence. grit and enthusiasm required for all that lies ahead. As Regional and Assistant Regional Director respectively, Ayeshah Parker and Kimberly Cahalan have taken up the charge, leading a dynamic team of committed individuals, sure to make the journey nothing short of inspirational. Thank you Jim, and each and everyone who has made NY's success NAFI's success. Onward!

NAFI SOUTHEAST



Above: NAFI Southeast leadership team representing Florida at the NAFI Conference

NAFI's PLL teams in Florida continue to provided quality evidenced-based services to youth and families in Duval, Polk, Hardee and Highlands Counties. Our Duval team has just completed a successful first year after breaking ground in the Jacksonville area, expanding NAFI's relationships with the Department of Juvenile Justice and service providers in Florida's Northeast Region.

NAFI's PLL therapists in the

Central Region received PLL awards for achieving statistically significant results based on year-end outcome data for families served in Polk, Hardee and Highland Counties. We look forward to another successful year of providing quality services while expanding our funding base and opportunities within the state.

HOMECARE CHOICES



At the end of October, Homecare Choices celebrated it's two year anniversary. In addition, the team is excited to have hit our target of a consistent 400+ hours of service per week this summer.

Our new target is 750 hours per week as a more ideal scale for supporting the administrative capacity needed for greater efficiency and market reach.

Staff culture is enormously important to Homecare Choices. Our staff has matured into a team of people who value the mission and each other. We've had 30 caregivers sign-on since launching services, but we are regularly working with 16 team members who have risen to the top. A group recently met with Dr. Bakal and took inspiration from being part of NAFI's larger purpose and culture. They have developed smaller teams that solve problems, manage schedules and develop creative approaches together. They use feedback and modeling to challenge and support each other. Staff have dared to propose many out-of-the-box approaches to get clients out into the world and connected to things that bring them happiness.

YOUTH LINK

Youth Link

We continued our holiday tradition of supplying over 100 families with turkeys at the Franklin Field Public Housing Development in Dorchester, MA.

Meanwhile, the Franklin Field athletes continue to dominate. The state's second fastest sprinter and top girls' basketball recruit came through Matthew Swartz's excellent programs.



Above: Youth Link's Matthew Swartz and Joe Robinson work with local teens to deliver turkeys to families.

Youth and Police Initiative

In 2018, we served young people and police in our thirtieth city across America, which was Milwaukee. We have now certified 96 trainers in 21 states.

We have tailored our training to meet many local needs from serving the Muslim Somali community in Boston to partnering with the Boys and Girls Clubs of Kansas City.

We also worked with immigrant families in Mount Kisco, New York and youth in lock up in Boston, demonstrating the diversity of the program.

Sadly, these ongoing accomplishments continue without our longtime head of training, Paul Lewis, who passed away in September, but whose legacy of breaking new ground we continue to honor.









Above and right: Staff from across NAFI/NFI throughout 2018.













We Are NAFI/NFI







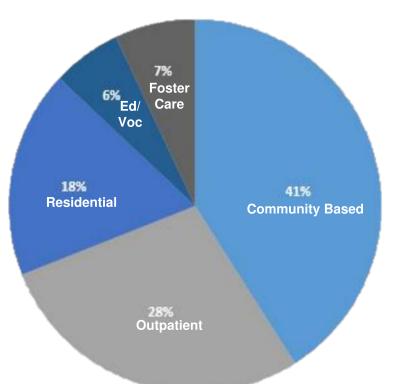






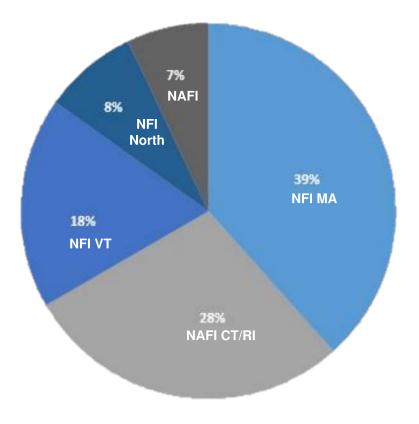
Service Delivery

PEOPLE SERVED BY SERVICE TYPE



A Total of 8,867 people were served by NAFI/NFI programs throughout Fiscal Year 2018!

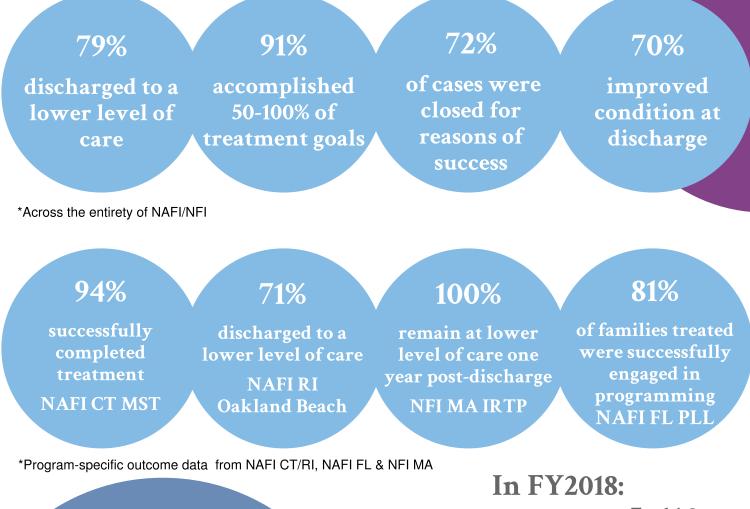
PEOPLE SERVED BY LOCATION



PROGRAMMATIC OUTCOME ACHIEVEMENTS

NAFI/NFI believes in results-based accountability. We track our progress, implement quality improvement plans and measure data across all programming to ensure service delivery that is up to internal best practice standards as well as the expectations of our funders. We are continually monitoring efforts as part of an agency-wide commitment to never stop growing or reaching for improvement.

Tracking Success



Discharge total: 5,610 Average length of stay: 255 days Total days in programs: 1,430,503

Financial Report

<u>Corporation</u>	FY18 Revenue
NAFI Connecticut/Rhode Island	\$26,314,473
NFI Massachusetts	\$31,081,201
NFI North	\$21,899,998
NFI Vermont	\$17,250,898
Region/Other	FY18 Revenue
Florida	\$709,903
New York	\$4,579,078
Virginia	\$145,397
NAFI Corp	\$10,107
Homecare Choices	\$210,776
Youth Link	\$213,275
<u>Total</u>	FY18 Revenue
Corporations	\$96,546,570
NAFI Regions/Other	\$5,868,536
All NAFI/NFI	\$102,415,106

A snapshot of NAFI/NFI's FY2018 finances shows continued and measured growth through a diverse and consistent cadre of program services. While the vast majority of program dollars come from our state contracts, we continue to invest in Youth Link's community-based prevention work and have slowly and steadily grown Homecare Choices.



Trends and Developments

NAFI/NFI Expands E-Prescribing

- NAFI/NFI further progressed in our efforts to improve quality of care through more robust usage of our electronic health record system by beginning to electronically prescribe.
- The ability to electronically prescribe controlled substances greatly reduces fraud while preventing patients from being able to "doctor shop" or receive multiple prescriptions for the same drug via different prescribers.
- With so many known benefits of E-Prescribing, and also due to an acute awareness of the nationwide opioid epidemic, many states are mandating by law that all prescribers submit prescriptions electronically.
- E-Prescribing boasts many benefits, including:
 - enhanced patient safety
 - reduced drug costs
 - improved workflow for doctors and administrators
 - reduction in overall health care costs by lowering potential medication errors

NAFI/NFI would like to congratulate the electronic health record administrators and teams from **NFI Massachusetts and NAFI Connecticut** for this very important step forward. In addition, thank you to Pamela Rocha, CFO, for supporting and valuing the importance of this advancement. We look forward to expanding these efforts as we move through FY2019, increasing efficiency, reducing fraud and more than anything, improving patient safety.





Above: NAFI HR Leaders Heather Kalin & Sharon Bogdan



NORTH AMERICAN FAMILY INSTITUTE, INC.

NAFI - NAFI Connecticut - NFI Massachusetts - NFI North - NFI Vermont

90 Maple Street, Unit 2, Stoneham, MA 02180 www.nafi.com