



North American Family Institute

2021
ANNUAL
REPORT

Message from the President

Dr. Yitzhak Bakal, President, NAFI/NFI

During the past year of living with the pandemic, NAFI/NFI has been challenged as never before, but also strengthened in singular ways. Many of our practices have been altered from the way we operated 18 months ago. We know that the virus is not yet in our rear view mirror as the future of its variants make us wary of claiming victory.

But I am pleased to report that we have kept every program at full strength without losing a single client or staff member to COVID.

The adjustments required to get through its harsh limitations has come in waves. At first we had to quickly become competent in new tele-communication platforms that were awkward and seemed far less personal than meeting face-to-face. But with experience we gained a new mastery of the technology. We have learned how to get together online in intimate ways that we never imagined would be possible just a year and a half ago. We learned how to extend these skills to training, therapy sessions and building a deeper sense of community in every part of the agency. We also have saved time and the cost of travel by meeting virtually.

Yet, even with these gains, there have been counter effects. Experiencing “screen fatigue” and isolation extracted a psychic toll that was new to all of us, but especially our clients and their families. The state of the economy also has caused us to rethink staff recruitment strategies, as well as staff



training and retention. There is a great deal of competition for workers from all sectors. Yet we know that helping vulnerable people in crisis offers a deep satisfaction that is special for those who seek these opportunities.

In the balance, we have done extraordinarily well, due in large part to the heroic efforts of our direct line staff who persevered under unforgiving conditions, working long hours with selfless commitment to our mission. Among them, our congregate care staff deserves special recognition for keeping our programs open and our consumers safe. Our executive directors and managers also deserve great praise for their tremendous ability to uphold our clients’ wellbeing, keeping our mission and our clients front and center as they responded to one challenge after another with remarkable skill and adeptness. They have helped keep us united in a way that has allowed us to nimbly find solutions to even the greatest challenges. *(continued on page 3)*

In addition to maintaining these standards of care in all of our programs and services, they also put a great deal of time and hard work into developing important ways to address issues of equity and diversity. From these efforts we have strengthened our past initiatives, but also implemented new ways to counter racism through the establishment of ad hoc committees, town hall meetings and training.

Finally, we must acknowledge the generous support we received from state officials and funders throughout this trying period. Of equal importance has been unflagging help and counsel from our board members and NAFI/NFI's many friends.

Even though one can say that there were times – and especially as the challenges accumulated – that fatigue and exhaustion

were almost overwhelming, it never stopped us. With such a strong team and knowing that we are facing new COVID variants, I can say with assurance that we are battle seasoned and battle ready. We have learned a great deal. Our partners and funding agencies have deep respect for our capabilities.

Looking ahead to 2022, I know our innovative staff and leaders will not shy away or back down from any challenge, ensuring that we will continue to operate outstanding programs and services far into the future.

We will stay strong united by our mission and mutual support.

Dr. Yitzhak Bakal
President
NAFI/NFI

***NAFI/NFI Client
Artwork***



Locations & Missions

NAFI Connecticut | Rhode Island
New York



Creating Diverse & Innovative Services for People

NFI Massachusetts



Maximizing Potential to Achieve the Full Promise of Community Living

NFI North



Inspiring & Empowering People to Reach Their Full Potential & Live Successfully in Their Community

NAFI Corporate | NAFI Florida
Homecare Choices | Youth Link

Creating Diverse & Innovative Services for People



NFI Vermont

Embracing Strengths & Acknowledging Struggles As We Join with Youth, Families, & Communities to Promote Growth & Healing



Who We Are & What We Do



Hildy Paris,
Chief Operating Officer

The NAFI/NFI Stoneham office acts as the parent corporation to our four subsidiaries: NFI Massachusetts, NFI North (Maine & New Hampshire), NFI Vermont and NAFI Connecticut/Rhode Island/New York.

Our office manages agency-wide functions including accounting, audits, financial reporting, benefits, compliance, risk management and business applications.

We also coordinate a variety of initiatives including wellness activities, the agency-wide annual conference, the arts committee and the give-back campaign.

NAFI directly supervises our Homecare Choices program, the Youth & Police Initiative, and the regional office in Florida.

Our agency believes in balancing the need for certain centralized functions as well as empowering the subsidiaries in many decentralized processes. We believe in giving a voice to all of our community members, this helps ensure that we are continually innovating and creating. *The Stoneham community works as a collective to provide the best customer service and resources to our field.*

Managing through COVID has been challenging, but it has pushed us to take advantage of many opportunities, such as changing from in-person to a remote milieu. *In many ways it has made us an even stronger community and we look forward to our on-going work and partnership with the field in the upcoming year.*



Kati Sweeney,
Executive Director of
Administration & Finance

Program Highlights

NAFI began providing services to youth involved in the juvenile justice system in Florida in 1993, under contract with the Florida Department of Juvenile Justice (DJJ). While rapidly expanding our footprint throughout the state of Florida by operating several residential facilities for the Department, in 2015, NAFI's focus shifted from residential commitment to community-based services with the award of a DJJ contract to provide evidence-based services in six counties within the state. The program – called ***Parenting with Love and Limits (PLL)*** – provides services to the parents of adolescent boys and girls sentenced to DJJ facilities throughout Florida. NAFI PLL teams ***work directly with parents to provide therapeutic intervention and skill-building in parents' homes, preparing them (and their families) for the youth's return to her or his home and community.*** A NAFI PLL team consists of a therapist and a case manager.

During the pandemic, our three teams began providing therapeutic services via telehealth to parents and to their children in residential facilities. We found that some families were more willing to participate from their own home.

NAFI Florida



**Deborah Yates,
Director of NAFI Florida**

Sessions were not missed due to transportation problems, working late, being ill and other obstacles faced while providing services in-person. Sessions were completed with no break in service delivery, resulting in high completion and engagement rates. In January of 2021, NAFI was awarded another five-year PLL contract by the DJJ that included a fourth team to service two additional counties.

In an effort to expand and diversify NAFI Florida's service delivery and funding sources, we have been meeting with child welfare agencies within the state to introduce NAFI as a possible provider of another evidence-based model called ***Functional Family Therapy (FFT)***. ***FFT is a community-based service for adolescent youth and families who are involved in foster care, focuses on improving foster family communication and support.*** (continued on page 7)

NAFI Florida also works with **NAFI's Youth & Police Initiative (YPI)** and is actively seeking funding for five YPI projects within the state, including a **YPI Re-entry Pilot Project**. The goal of the project is to reduce recidivism and seeks to track the positive outcomes of adjudicated youth through relationships built with police officers. Police are introduced into youths lives through participation in a five-day YPI training and

during monthly follow up activities for a year after the training. It is anticipated that this Re-entry Pilot will commence in the fall of 2021, with four additional YPI training sites funded in 2022.

NAFI Florida is looking forward to continuing to serve youth and families throughout the Sunshine State!

When COVID struck, the **Youth & Police Initiative (YPI)**, which brings together urban youth with police officers who patrol their neighborhoods, was expanding rapidly. We were negotiating with the National Basketball Association to work in multiple cities; and we were breaking new ground in London, Newark, across New York and Florida while fulfilling contracts in New England and Kansas City. But it all came to a sudden halt on March 20, 2020. **However, to the credit of innovative and dedicated YPI trainers and NAFI/NFI leaders, we refused to give up.** We determined instead to innovate with online versions of YPI and even our Train-the-Trainer model. We field-tested them with an evaluation by John Jay College of Criminal Justice, honed the new model and launched it four months after COVID began.



It took some active persuasion but many of our clients were willing to utilize the online version. Virtually all of them were pleased with the outcomes.

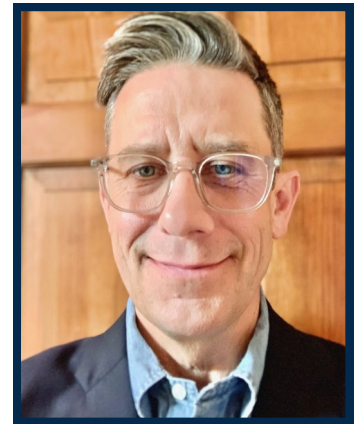
In retrospect, although the pandemic was an initial setback, the YPI team grew ever closer from the adversity, creating new training modules that have greatly expanded our offerings to cities and police departments across the country.

We are excited about the upcoming year and its many possibilities.



Jay Paris,
Director of Prevention and

Program Highlights



Peter Carey,
Executive Director of
Homecare Choices

At NAFI's Homecare Choices, our mission is to enrich the quality of life and independence of the people we serve on the Cape. We provide client-centered, in-home senior care services customized to meet the unique needs of each client and family.

Despite all of the unusual challenges of 2021, it has also been a year for growth and new opportunities for Homecare Choices. Our service hours are up 50% to more than 1200 hours of care delivered weekly. We receive daily referrals and new client inquiries. For many, we are their first-choice agency when seeking care. We began our COVID journey at the same time that we joined forces with the *Care From The Heart* home care agency. At this stage we have achieved a single reputation for quality and partners have come to trust that we will honor and grow the legacy that was entrusted to us by Care From The Heart.

The demand for home care support has increased steeply in the last year and

the trend toward remaining at home – instead of in assisted living – is clear. Although the home care industry is experiencing a nationwide staffing shortage, our recruiting has increased and our caregiving staff are our best recruiters. Due to the staff shortages, hourly rates for home care services on Cape Cod have risen sharply; our basic rates have gone up modestly but remain below average.

Homecare Choices is proud to bring the NAFI mission and spirit to seniors in the Cape Cod area and excited to help more and more people age happily in-place each year.

Employee Appreciation

Although we were unable to join together for the annual conference in October, we did take time to thank our dedicated staff and acknowledged the many ways our agency continues to turn obstacles into opportunities.

Dr. Bakal shared a special video message and many other staff expressed their gratitude and encouragement from all around NAFI/NFI.



Employees received an appreciation gift and great drawing prizes!

Corporate Highlights

Human Resources

The NAFI Corporate Human Resource department provides support for benefits, the Human Resources Information System (HRIS), compliance, recruiting and an array of other topics for the entire Agency. In 2021, we have successfully negotiated a 0% increase on our HRIS system contract for the next three years. *We were proud to be able to extend a 0% increase in medical costs to our employees through our health plan with Blue Cross Blue Shield of Massachusetts for this year.* We changed our pharmacy vendor to Express Scripts and anticipate a plan savings of approximately \$400,000.

An education plan, in conjunction with Principal Financial Group, was developed

to educate employees on saving for retirement. The educational sessions resulted in a 39% increase in contributions by employees and an average retirement wellness score of 70 (or higher) for most participants. We currently have a 30% participation rate in our retirement plan and over \$19M in assets.



Sharon Bogdan,
Director of Human
Resources



Corporate Highlights

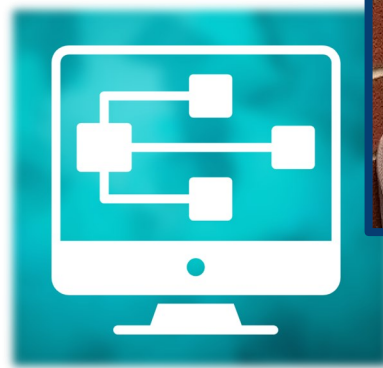
Information Technology

Although somewhat redirected by the pandemic, NAFI/NFI has continued on our strategic technology journey with success. ***A primary focus for IT has been on digital transformation that increases staff accessibility and overall security while also improving user experience.***

This past fiscal year, we continued to shift our technology to the cloud, including migrating to the Office365 suite for our email and employee intranet. ***We continue to harness new digital technologies to improve business processes around document management, teamwork, and online meetings.***

We tightened security with a new, robust email protection feature along with a

staff education program. We continue to expand our single sign-on and online training capabilities to make our staff's user experience seamless from hire to onboarding. We also continue to provide data for agency leadership to track outcomes and to ensure high-quality client care.



**Kristina Boldebuck,
Director of Business
Applications**

Finance

Our finance department has eagerly accepted the challenge of focusing on leveraging technology to improve our communication and efficacy in this new remote environment. We have streamlined paperless internal finance and audit processes and developed new procedures regarding electronic document retention. To reduce technology costs, we migrated our accounting software into our central hosting environment. These changes have increased our communication and collaboration with the other NAFI corporations,

and we have provided business office support as needed. *(continued on page 11)*



**Pamela Rocha,
Chief Financial Officer,
Treasurer**



Finance *(continued)*

The finance team has successfully implemented the new lease accounting standard requirements issued by the Financial Accounting Standards Board (FASB), streamlining the agency's accounting for leases under the US Generally Accepted Accounting Principles (GAAP). The new standards will enhance transparency into

liabilities resulting from leasing arrangements by bringing those obligations onto the balance sheet. ***Finally, the payroll team created additional pay codes to support the increased emergency relief and hazard pay for staff in the field who continue to care for our clients throughout the pandemic.***

Risk Management

Despite the risk and insurance challenges presented by the pandemic, the agency has successfully managed our property and casualty exposures.

The health and well-being of our employees and clients were our top priority. Our 2021 wellness campaign saw a significant increase in employee participation.

An external consultant completed an assessment of our high-risk service areas. The result was a roadmap to reduce our risk profile by increasing the coordination among our agency functions that assess and manage vulnerabilities.

Risk identification and mitigation initiatives continued in 2021. Our Corporate Risk & Safety Committee expanded the reference checking platform to include a post-hire complement; our telematics program improved their data capability, and the



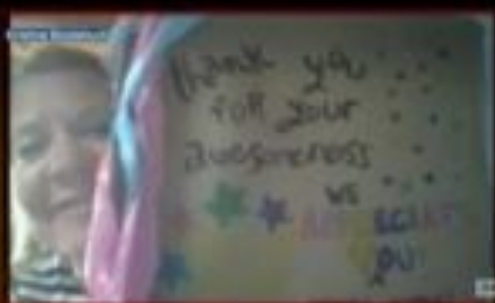
**Colleen Macomber,
Director of Risk &
Insurance**



agency rolled out a water and temperature monitoring service that assists with water damage/pipe freeze/burst prevention.

Success around loss control and risk prevention was realized in 2021, with a dividend return of more than \$200,000 from our captive insurer, The Captive Advantage LLC.

The NAFI Stoneham Office Says THANK YOU to our



amazing frontline essential human service workers!



By the Numbers

NAFI/NFI Entire Agency



\$118,771,000
Total Annual Revenue



1,562
Employees



110
Programs



10,224
Clients Served

NAFI/NFI Corporations

NAFI Connecticut/ Rhode Island/New York

Revenue	\$27,587,000
Employees	315
Programs	35

NAFI Corp (Home Care Choices, NAFI Florida, Youth Link)

Revenue	\$2,535,000
Employees	103
Programs	3

NFI Massachusetts

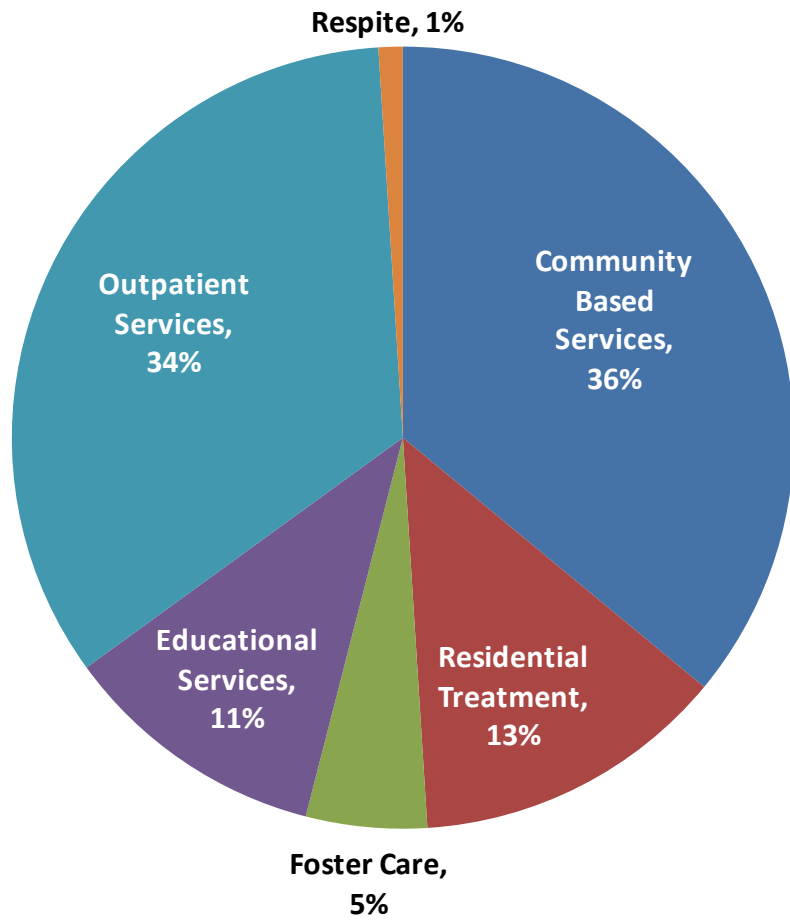
Revenue	\$32,214,000
Employees	454
Programs	25

NFI North

Revenue	\$35,364,000
Employees	368
Programs	23

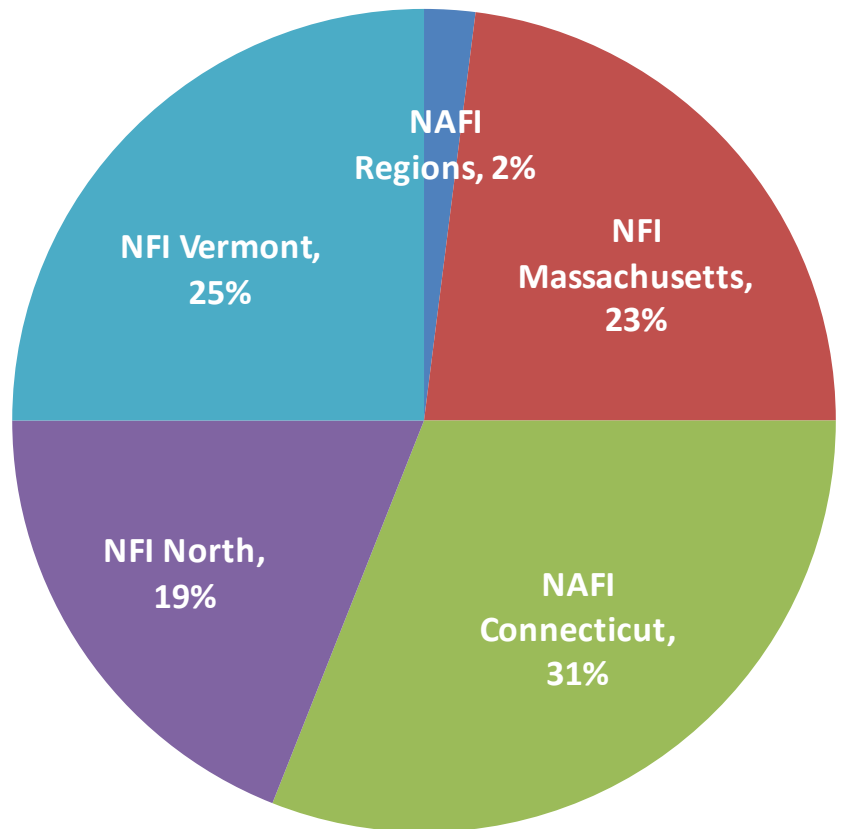
NFI Vermont

Revenue	\$21,071,000
Employees	322
Programs	24



NAFI/NFI Clients Served By Program Type

NAFI/NFI Clients Served By Corporation



NAFI/NFI Client Artwork



NAFI Board of Directors

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Dr. Paul Dann, Executive Director,
NFI North (Maine & New Hampshire)

Hildegarde Paris, Chief Operating
Officer

Lydia Todd, Executive Director,
NFI Massachusetts

Kati Sweeney, Executive Director of
Administration & Finance

Dr. Chuck Myers, Executive Director,
NFI Vermont

Pamela Rocha, Chief Financial Officer

Lynn Bishop, Executive Director,
NAFI Connecticut/Rhode Island/
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Dr. Daniel Rosenn, Medical Director



NAFI/NFI

*Creating Diverse & Innovative
Services for People*

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