



**Contact:** Lawrence Bocchiere III, President [president@wellspouse.org](mailto:president@wellspouse.org)  
Terri Corcoran, Mainstay Editor [mainstay@wellspouse.org](mailto:mainstay@wellspouse.org)  
Richard Anderson, Immediate Past President [richard@wellspouse.org](mailto:richard@wellspouse.org)

**Or:** Donna McQuade, Office Manager; Carol Hryvniak, Office Assistant;  
Johanna Karr, Media and Public Relations, all: [info@wellspouse.org](mailto:info@wellspouse.org)

### **Well Spouse™ Association – 2009 Annual Report -- Dec. 31, 2009**

Prepared by Richard Anderson, Immediate Past President, Board Member  
Well Spouse™ Association, 63 West Main St. Suite H, Freehold, NJ 07728 USA  
<http://wellspouse.org> 1-800-838-0879

#### **Mission:**

The Well Spouse™ Association, a nonprofit 501 (c)(3) membership organization, advocates for and addresses the needs of individuals caring for a chronically ill and/or disabled spouse or partner. We offer peer to peer support and educate health care professionals and the general public about the special challenges and unique issues "well" spouses face every day.

#### **The Organization:**

- **Office:** This year the paid Office staff time was reduced to 0.8 Full-Time Equivalent hours. Otherwise, the WSA is an all-volunteer, grassroots organization with a growing membership.

- **Volunteers:** It is estimated that over 10,000 hours a year of volunteer time are donated to the WSA by Board members, support group leaders, contact persons, mentors, and members who helped organize respite events, publish newsletters and add to the website.

#### **Highlights of 2009:**

- **Summary:** 2009 was a difficult year for all non-profits, with declining revenues due to the severe economic conditions of the Great Recession. Nevertheless, the WSA rose to the challenge by combining new ways of fundraising and cost-cutting, as well as by attracting donations in kind, and volunteer help

- **Contacts:** 539 contacts were made with the press, members of the general public and professionals, an increase of 10% over 2008. Contacts are made to help spread public knowledge of and information about spousal caregiving, and the WSA.

- **Trade Mark:** The "Well Spouse" part of our name was trademarked, with the help of a patent and trademark search consultant.

- **New President:** In October Lawrence Bocchiere III was elected President of the WSA, taking over from Richard Anderson, who completed 4 years, 2005-2009 as President.

- **Member Minute:** A new biweekly update newsletter, the *Member Minute* was started in January 2009 and is sent by E-mail to all supporting (paid) members.

- **Military Spousal Caregivers Initiative:** At year end, a special initiative was begun to reach out to military spousal caregivers, with the offer of a year's free supporting membership.

- **Southwest Region Initiative:** At year end, with the help of a donation from Western Refining, Inc. of Phoenix, AZ, a special initiative was launched to attract more spousal caregivers to join the WSA by staging an event in Phoenix, and publicizing it and the WSA in the surrounding area.

### **Finances, Grants and Fundraising:**

- **Revenues:** This year 98.5% of our revenue came from member dues and donations.

- **Donations in Kind:** We were fortunate to have donations in kind from

- Océ Printing, Trumbull, CT for printing brochures
- Ron Rattie of StillPixel.com, Frederick, MD for web design services

- **Cash Flow:** A loss in capital reserve of \$3,840 was experienced. This was a substantial improvement over 2008, due entirely to extra efforts by paid Staff; and Board members and other ordinary members, volunteers all, to manage continuing and new fundraising efforts.

- **Fundraising:**

- The 2009 Annual Appeal raised over \$9,200.
- The 2009 Summer Appeal raised \$11,500.
- Special fundraising events, new this year, such as the 2008-2009 Friends and Family Appeal, an online auction, a department store collection day and other unsolicited donations raised a further \$8,000.

- **Supporting Members:** Membership dues brought in \$15,600.

- **Special Donation:** In October, a special donation of \$9,500 was received from Western Refining, of Phoenix, AZ, to help the WSA reach out to spousal caregivers in Arizona and the Southwest.

- **Advertising Revenues:** Successful efforts were made by Board member Joe Wolf to increase revenues for advertising on our website and in our newsletter, *Mainstay*.

- **Annual Conference:** This year revenues (including donations) for the conference exceeded expenses by a small amount. While not a money-making venture, the aim of making the conference pay for itself was achieved. Credit is due to Treasurer Bob Mastrogiovanni, and our Office staff for managing this.

### **Web Site:**

- **Content:** The Members-Only area on the WSA website was populated with content: stories and articles from members, respite event and national conference write-ups, and resource links, for example.

- **Visitors:** In 2009 there were approximately 300,000 content hits on the website.

- **Online WSA Forum:** Erin Engelhardt continued to be the Administrator of the WSA Forum, the online board open to all, and free to join. An estimated 15% of Forum members are supporting (paid) members of the WSA.

- **Forum Members:** At year's end there were over 2100 registered users of the Forum. This figure includes turnover, as members are removed from the Forum after approximately six months of inactivity.

- **Newbies:** In 2009, 877 new people joined the Forum, a rate of about 73 a month.

### **Office:**

- **Personnel Changes:** The resignation of Executive Administrator Paula LeBlanc as of July 31, 2009 was accepted with regret. At that time, Carol Hryvniak was hired as an Office Assistant. Johanna Karr became an outside consultant, in charge of editing and producing the bi-weekly *Member Minute*. Donna McQuade, who was the Membership Coordinator, took on the job of Office Manager.

- **Office Hours:** Early in 2009 the number of hours per week for Office staff was cut to 30.

### **2009 National Conference:**

- **Attendance:** Over 80 people attended the 2009 conference in Annapolis, MD.

- **Credits:** Special thanks are due to the Office staff, and especially to Donna McQuade and Paula LeBlanc for organizing the many details of the conference.

### **Membership:**

- **Figures:** At year-end there were 950 current individual, dues-paying memberships, and 25 Professional memberships.

- **Renewals:** The Office staff developed a routine to send out regular notices in the mail and E-mail reminders to solicit renewals.

- **Changes:** Turnover of membership is approximately 20%, of those who do not renew, versus newcomers.

### **Mainstay Newsletter:**

- **Production:** In 2009 four issues of the *Mainstay* newsletter were produced under the capable direction of Editor Marty Beilin, with the help of a committee of volunteer writers and editors. *Mainstay* continues to be seen by members as one of the major benefits of a WSA supporting membership.

### **Support Group Network:**

- **Figures:** Numbers of local area WSA Support Groups fluctuated over the year, and by year-end we had a total of 46 groups; plus 21 volunteer Support Contact persons – WSA Ambassadors. The total includes 2 Support Groups in Canada

- **Volunteer Leadership:** Each peer-led group has one, or sometimes two volunteer WSA members organizing and leading it.

- **Volunteer Contact People:** In some states there are volunteer contact people, who do not currently run a group, but who are available to talk to those who might be interested to do so.

- **Volunteer Support Group Network Coordinator:** This year Board member and volunteer Wendy Picardo took over part of the work of liaising with our volunteer Support Group leaders, along with Office Manager and Membership Coordinator Donna McQuade.

### **Outreach:**

- **Activity:** This year's 539 contacts were made by staff and volunteers, including the President, in a continued outreach efforts to publicize the WSA in the following ways, by:
  - Contacting professional caregivers
  - Exchanging website links
  - Contacting other caregiver, and disease organizations
  - Attending caregiving organization meetings, especially in the DC area
  - Writing responses to blogs in response to blog posts
  - Writing letters to the editor in response to articles
  - Public speaking, to the general public, professionals and other informal caregivers
  - Presenting *Caregiver Journey* workshops, and workshops at caregiver conferences
  - Contacting print and other media and doing interviews on the WSA and spousal caregiving
  - Richard Anderson continued contributing articles to his *Life of a Well Spouse* blog in CarePages.com, with occasional guest contributions from Board member Terri Corcoran.

#### **WSA Board and Executive Committee: Volunteer Leadership:**

- The WSA Board currently meets by telephone every six weeks and in person during the annual conference in October. In between the Board carries on the work of committees on finance, support groups, membership, public relations, fundraising and grants, mentorship and the website. In May, 2009, the Board met in person at Cherry Hill, NJ, to discuss fundraising strategies.
- The WSA Executive Committee meets once a month, and is composed of the Board Chair, President, Past President, Treasurer and Secretary.
- A list of the Board members as of the end of 2009 is appended to this report.
- This year marked some turnover in Board membership, as several long-time members retired, and newcomers joined. We appreciate the service of the retirees, and welcome the willingness of the new Board members to give back, in return for what the organization has done for them, and meant to them.

#### **Goals achieved in 2009:**

- In view of the economic turmoil brought on by the Great Recession of 2008-2009, goals for 2009 were focused on how to reduce the negative cash flow the WSA has seen in the past three years. Of new ways tried to achieve this, the following worked best:

- Adding advertising to the website
- Holding our first "Friends and Family" fundraising campaign
- Using E-Bay to hold an online auction to raise money
- Raising money from professional and corporate memberships that give exposure on the Website in return.

#### **Goals for 2010:**

- **Achieve a Positive Cash Flow:** As a non-profit, 501(c)(3) organization, the WSA is certainly not in the business of making money, but having a cash flow that does not deplete our bank account is important, and is a major goal of 2010.

- **Carry out Special Outreach Projects:** To attract new WSA supporting (paid) members (with the offer of one year's free membership):

- Military Spousal Caregivers
- Southwest Region Expansion

- **Improve Backup for Local Area WSA Support Group Leaders:** We have a Board Member, Wendy Picardo, who is devoted to this goal. It is hoped we can arrange a telephone support group for support group leaders, and plans are underway to have an extended "pre-conference" workshop for them, the day before the next Annual Conference, to be held in Princeton, NJ.

- **Devise a New Five-Year Plan, Committee by Committee:** At the Cherry Hill Board meeting in May, 2010, discussion will focus on this.

**2009 Board and Executive Committee Members:** At year-end

<b>Name, Office and Committee Membership</b> Note EC = Executive Committee	<b>Initial Election Date</b>	<b>Old /Current Term Expiry Date</b>	<b>New Term Expiry Date</b>
Richard Anderson, Past President, EC, Chair, Website/Technology, Public Relations: Caregiver Journey	2003	2011	
Jerry Bishop, Board Chair, EC, Mentor Coordinator, Support Network	2004	2010	
Sharron Blakely, EC Secretary, Legislative Affairs	2009	2011	
Larry Bocchiere President, EC	2008	2010	
Amie Brockway Grants/Fundraising	2007	2011	
Kelley Brunn Southwest Regional Coordinator	2009	2011	
Terri Corcoran Board Secretary, Co-Editor, <i>Mainstay</i> ; Chair, Public Relations	2007	2011	
Rachel Hadas, Support Group Network			
Bob Kerfoot Fundraising	2008	2010	
Bob Mastrogiovanni Treasurer, Chair Finance, EC	2006	2010	
Gail Neustadt Public Relations	2009	2011	
Wendy Picardo	2009	2011	

Chair, Support Network			
Jim Russell Fundraising	2008	2010	
Dorothy Saunders <i>Mainstay</i>	2008	2010	
Joe Wolf Advertising, Finance	2008	2010	
Non-Board Member Committee Chairs			
Marty Beilin, <i>Mainstay</i> , Co- Editor/Co-Chair			

### Officers for 2009-2010

President: Larry Bocchiere  
 Past President: Richard Anderson  
 Treasurer: Bob Mastrogiovanni  
 Secretary (EC): Sharron Blakely  
 Secretary (BOD): Terri Corcoran  
 Board Chair: Jerry Bishop

### Board Committees December 2009

#Non-Board member

#### Bylaws Committee

Vacant, convened as necessary

#### Nominating Committee

(Main task is to extend Board Membership and establish an Advisory Committee for the Board)

#### Executive Committee

Larry Bocchiere (Chair), Richard Anderson, Bob Mastrogiovanni, Sharron Blakeley (Secretary)

#### Finance Committee

Bob Mastrogiovanni (Chair), Joe Wolf (Advertising)

Legislative Affairs (Chair) Sharron Blakely

#### Support Group Network Committee

Wendy Picardo (Chair), Rachel Hadas, #Rona Auster, Jerry Bishop, #Donna McQuade

#### Mentorship Committee

Jerry Bishop (Chair)

#### Mainstay (Newsletter) Committee

#Marty Beilin (Co-Editor/Co-Chair), Terri Corcoran (Co-Editor/Co-Chair), #Pam Alesescu, Rita Herskovitz, #Sandra Bekele, #Dina Gerasia, #Dorothy Pocinki, #Dorothy Saunders

Fundraising /Grants Committee

Chair vacant, Richard Anderson, #Marty Beilin, Amie Brockway, Jim Russell

Membership Committee

#Donna McQuade

Public Relations Committee

Terri Corcoran (Chair), Richard Anderson, Rachel Hadas, Gail Neustadt

Southwest Regional Coordinator

Kelley Brunn

Website/Technology Committee (office computers, website)

Richard Anderson (Chair), #Donna Amato (Web Manager), #Marty Beilin, Jerry Bishop, Erin Engelhardt [for WSA Online Community matters]