

2022.Q3 Review

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Executive Summary



Industry statistics

- **69%** families worried about special needs dependents*
- **17%** children diagnosed with mental, behavioral, or developmental disorder**
- **56%** full time employees are caregivers***

Engagement

- New cases: **56**
- Cases in progress: **117**
- Closed cases: **34**

Point Solution Integration

- Inbound: **2** members
- Outbound: **6** members

Challenges

- Increased integration effort from point solution partners
- Frontline manager education
- Lack of referrals from FMLA/ Leave/ Disability Department

Insights

- **61%** of cases highly complex (3+ caregiving solutions)
- **60%** members At-Risk for Burnout
- **95%** member engagement driven by home mailer

* MetLife 2005 "The Torn Security Blanket: Children with Special Needs and the Planning Gap"

** Per the CDC; *Pediatrics* (2019) 144 (4): e20190811

*** National Alliance for Caregiving and AARP. (2015). Caregiving in the U.S.

2022.Q3 Review

Sections

- + Utilization
- + Service Details
- + Impact
- + Case Study
- + Engagement & Strategy

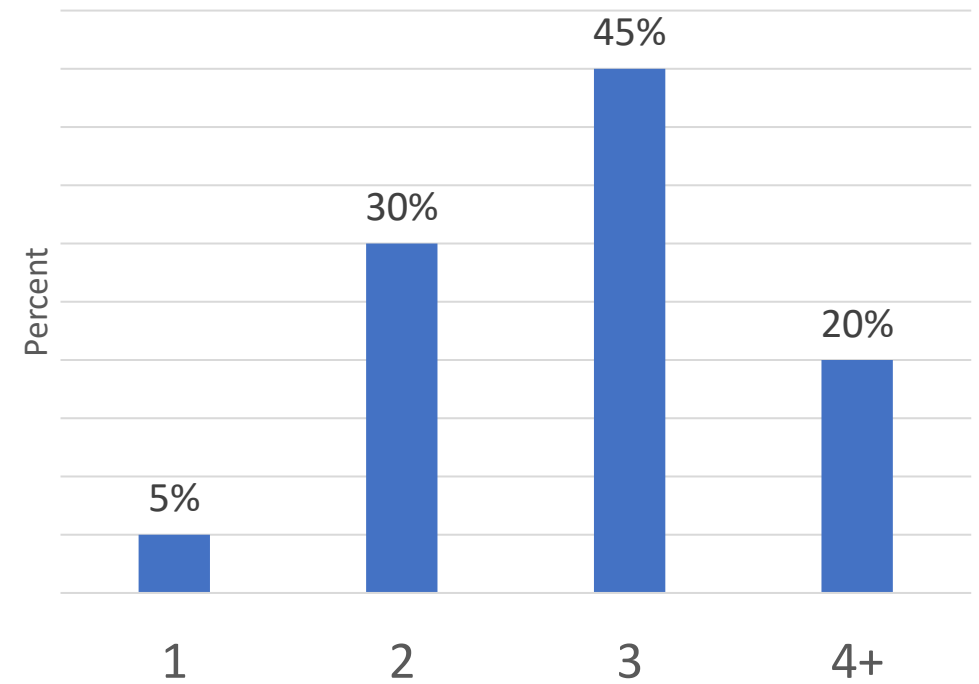


Utilization

Open cases tend to peak at the beginning and end of each year and track with engagement efforts.

NEW CASES	OPEN CASES	CLOSED CASES
56	117	34

COMPARATIVE UTILIZATION	
1.7% vs. 2.2%	+29% increase



■ # of Care Recipients

65% of cases require solutions for 3+ care recipients, often including employees themselves

Service Details

Connecting with Care Experts

CASE LENGTH		CAREGIVING SOLUTIONS			
Average Call Time 22 hours	Average Engagement: 18 months	One: 4%	Two: 10%	Three: 25%	>3: 61%

AVERAGE INBOUND REFERRALS	AVERAGE OUTBOUND REFERRALS
2 Members	6 Members

ENTRY POINT TO FAMILY FIRST			
Portal: 25%	Calls: 10%	Emails: 4%	Chat Conversions: 61%

Service Details

CAREGIVING CONCERNS	RANK
ELDERCARE	1
MENTAL HEALTH	2
CHILD & ADOLESCENT WELLBEING	3
COUNSELING	4
FINANCIAL CONCERNS	5
INSURANCE HELP	6
MEDICARE NAVIGATION	7
FAMILY DYNAMICS / CONFLICT RESOLUTION	8
HOMECARE	9
FACILITY PLACEMENT	10

Service Details

Expertise to Identify Underlying Caregiver Needs

TOP REASON FOR CALLING	TOP ISSUES WE'RE SOLVING
INSURANCE HELP	NEW OR WORSENING DIAGNOSIS
CHILD & ADOLESCENT WELLBEING	ALZHEIMER'S / DEMENTIA
SUBSTANCE USE DISORDER & ADDICTION	COMPLEX FAMILY DYNAMICS
FINANCIAL CHALLENGES (BILL PAY & NEGOTIATIONS)	MENTAL HEALTH
FACILITY PLACEMENT	SAFETY CONCERNS
LEGAL ISSUES (POAs & WILLS)	AGING-IN-PLACE

Impact

Caregiver Burnout Scores

ASSESSMENT CATEGORIES	RESPONDENTS	ASSESSMENT RESULTS AND STRATEGIES
NO BURNOUT / LOW BURNOUT RISK	40%	Indicates an acceptable level of caregiving responsibilities. As caregiving is often a long-term commitment, it is crucial to regularly assess stress levels and have a plan for when responsibilities increase over time. The caregiver should maintain healthy habits and, if in a relationship, learn how to balance responsibilities as a couple or family. Building a solid foundational approach can help the caregiver make rational and confident decisions for the loved one and the caregiver.
ELEVATED BURNOUT RISK	31%	Indicates stress is reasonably managed but typically results in de-prioritization of the caregiver’s wellbeing. This can lead to chronic stress, putting the caregiver at risk for depression, colds, and other illnesses. This is commonly viewed as the caregiving tipping point. Care plans should be assessed and the intended caregiving plan should be determined, especially when loved ones have conditions like dementia, Parkinson’s, and heart and lung disease as increasing physical, mental and financial burdens are to be expected. Review of home care services or other long term care options is recommended to give the caregiving family time to plan financial and legal arrangements.
HIGH BURNOUT RISK	17%	As a loved one’s health conditions progresses, the caregiver may experience anxiety, depression, compromised immunity, physical exhaustion, and sleep deprivation, leading to or exacerbating chronic diseases such as hypertension, diabetes, heart disease, and chronic depression, and may lead to death. Financial strain may also be present. Attending support groups, sharing household and caregiving responsibilities are recommended.
SEVERE BURNOUT	12%	The caregiver’s health is at stake and requires immediate intervention for both the caregiver’s and loved one’s wellbeing. The caregiver must follow the recommendations given per lower caregiver risk levels or it may result in compassion fatigue, depression and anxiety, heart attack or stroke, and even neglect of the loved one. The caregiver must have a physical check-up with their PCP, and should look into respite care provided by a home care agency, an assisted living facility or a nursing home. Until wellbeing is restored to the caregiver, the loved one should accept care from another family member or at a professional level of care.

Impact

Care Paths

After concluding their investigation and discovery, our Care Experts ensure:

- Loved ones are on the right care path
- Caregivers are educated and empowered
- Employees avoid presenteeism, preventable stress, FMLA leave – or leave work entirely

CLINICAL IMPACT

Change to Care Path

76%

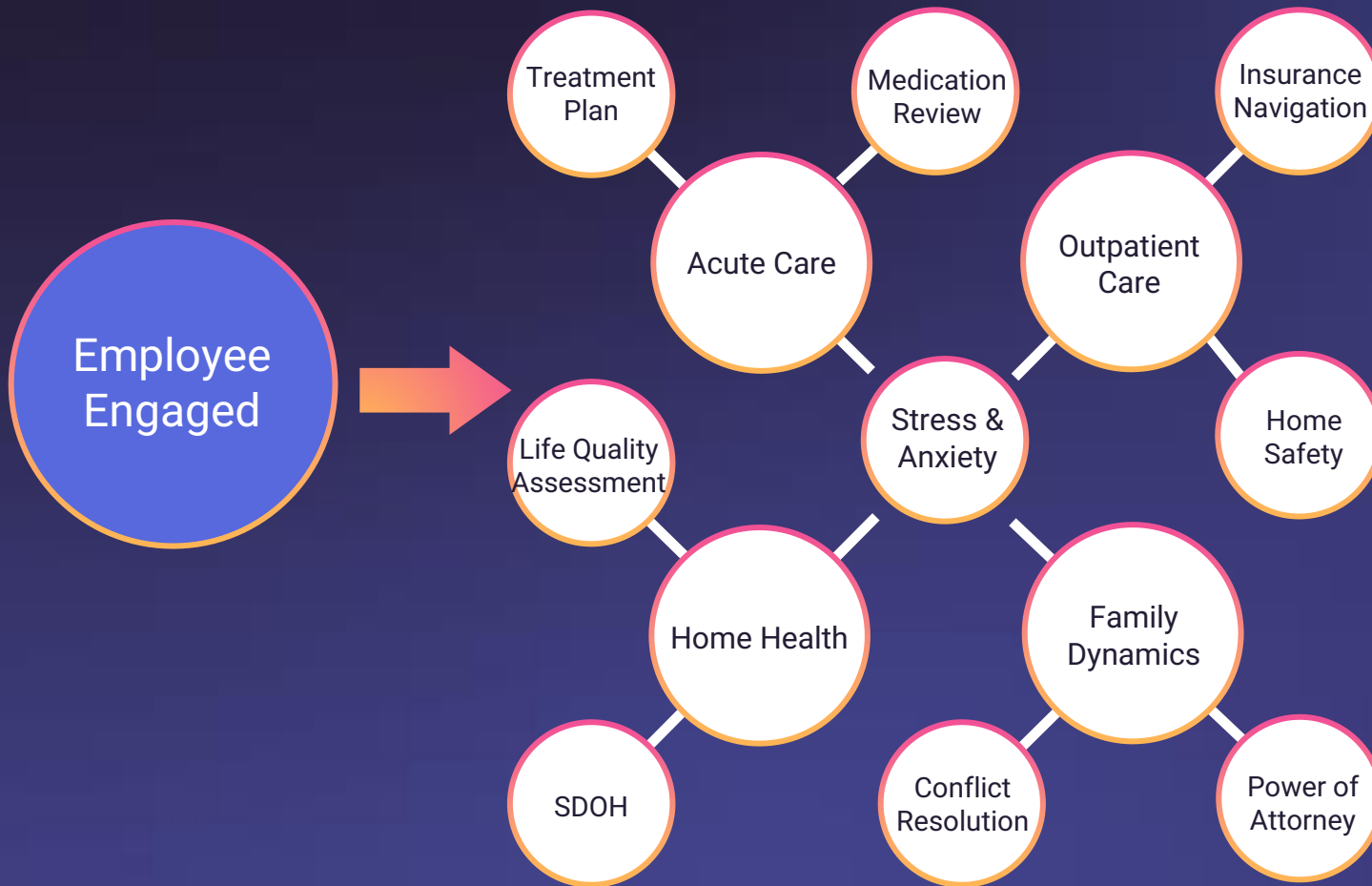

Satisfaction

At the conclusion of each case, patients are asked a series of questions to measure Family First's effectiveness and ability to meet and exceed patient's expectations. Sample questions:

- How would you rate the overall care you received from your Care Expert?
- How would you rate the professionalism of our Care Experts?
- Do you feel better equipped to manage your caregiving situation?
- Did you feel Family First impacted your ability to be focused and productive at work?
- Did you avoid taking time off or reducing your hours because of Family First's service?

A separate report of these results will be provided to you for analysis and discussion.

Caregiving Blueprint

family first

Member name: Rhea Richards
Family member name: Nancy Richards
DOB: 11/04/1988
Your care expert: Sara MacDonald
Email: smacdonald@family-first.com **Phone:** 617.507.2959

Initial reason for call:
 Rhea is a 54-year-old female whose mother was diagnosed with dementia six years ago. His mother's dementia appears to be advancing. She is beginning to exhibit functional decline and her memory issues are worsening. Rhea is considering leaving her job to be home full-time.

Goal: Nancy lives safely in her home with Rhea
Challenge: Nancy takes > 5 medications and is experiencing memory loss
Intervention:
Status towards goal: Not Started In Progress Done
As of 8/3/2020, Family First has requested medical records from 4 different providers.

Goal: Rhea is able to remain working
Challenge: Rhea is working, she feels her mom is falling in the home and she reports she does not know how to care for someone with memory loss
Intervention:
Status towards goal: Not Started In Progress Done
As of 8/3/2020 Rhea is going to follow up on the initial appointment by reading articles within the Caregiving Library that Melissa has sent her. During the next appointment we will explore care options.

- ✓ Identify needs and risks
- ✓ Communication tool for clinicians and members
- ✓ Member-centric and personalized
- ✓ Updated and modified as needs change

Case Study

Caregiving Situation

Rose is contemplating leaving her job to care for her mom, Helen who is having memory issues. Her dad, Dan, is the primary caregiver, experiencing burnout and has nowhere to turn. Rose worries Helen may need to move to a memory care facility before long.

Expert Discovery

Rose's Expert Care Team requests medical records and completes a detailed, comprehensive intake of her situation.

They discover Helen's doctor had diagnosed her with cognitive impairment related to depression. The doctor prescribed medication and ordered an MRI to rule out vascular dementia. Unknown to Rose, Helen missed the MRI appointment and was not taking the antidepressant.

Rose also learns Dan was recently diagnosed with coronary artery disease, but was not following up with his doctors. Her parents, they find, are also struggling with food insecurity.

Solution

Rose's Care Team creates a Care Plan for her family, which she can share and track progress against. The Expert Caregiving Portal supports virtual care, which our Experts use to host "care conferences" to educate Rose's parents on its recommendations.

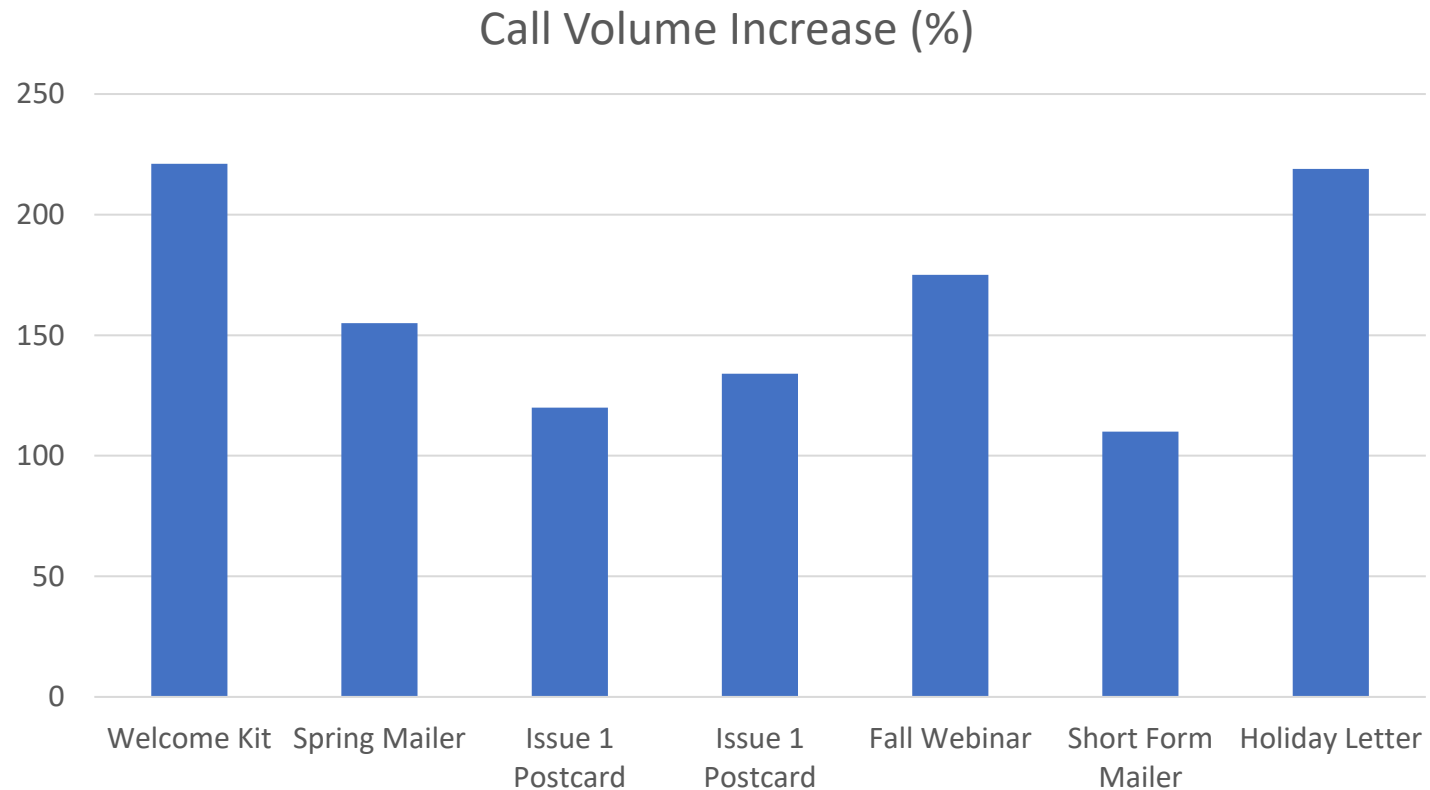
Instead of leaving work herself, our Experts recommend Rose employ a home health worker to provide medication reminders, help with meal prep, cleaning, and to be Rose's "eyes and ears." Rose and her family continue to work with their Care Team today.

Impact

- + Avoided unnecessary and costly placement in a memory care facility
- + Discovery of underlying health issues and SDOH challenges
- + Mental and emotional relief
- + Rose remains employed

Engagement

Volume Tied to Campaigns



HOW DID YOU LEARN ABOUT FAMILY FIRST?

95%
WELCOME LETTER

25%
POSTCARD

95%
INTRANET

Engagement

Insights

Based on your employee population and their top concerns, we recommend targeted messaging in these areas.

TOP 3 CONCERNS

MENTAL HEALTH

ALZHEIMER'S / DEMENTIA

COMPLEX FAMILY DYNAMICS

TOP 3 SPECIALTIES

ELDERCARE

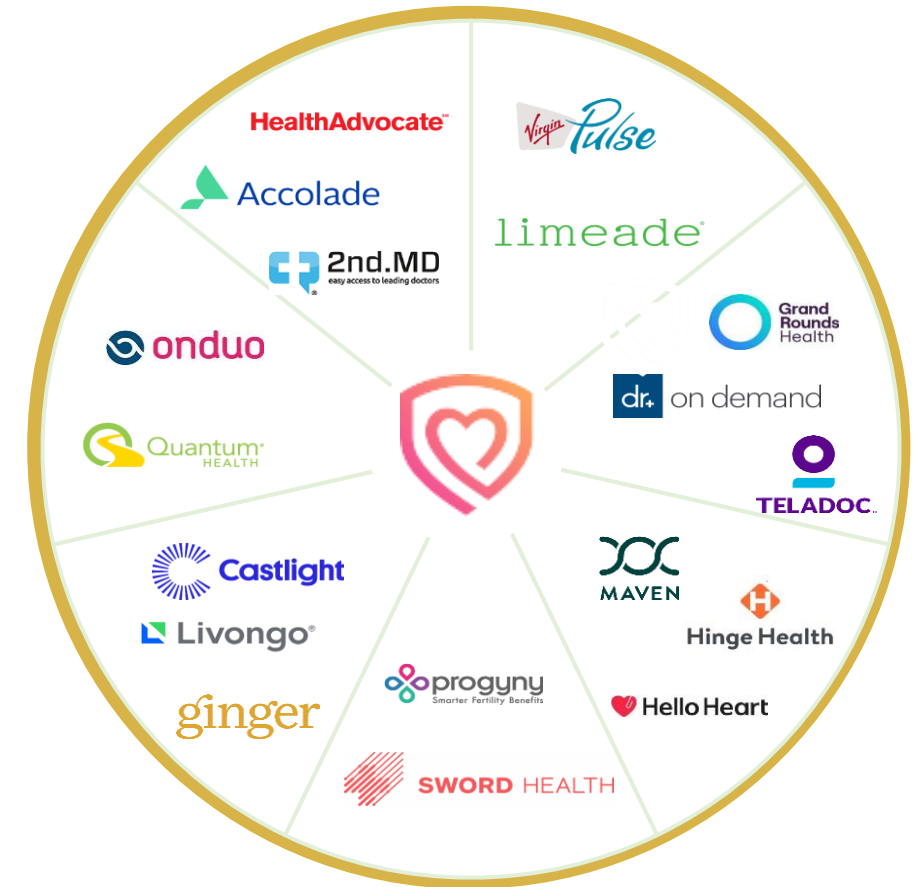
CHILD & ADOLESCENT WELLBEING

COUNSELING

[CLIENT] 2023 Benefits Strategy

Benefits Realization

- Employee needs assessment
 - By demographic/focus group(s)
 - Blind survey
- Organizational objectives
 - Boost employee morale
 - Raise employee attrition/retention rate
- Utilization of current programs
 - Administrative burden
 - Under-utilization benefit resolution
 - Increased point solution integration (non-silo approach to whole person health)



Engagement Strategy

Proposed Opportunities

Successful campaigns from the prior year function as the core to your new Calendar Year engagement strategy.

The recommended engagement opportunities is based on the **seven touches principle in marketing**.

ENGAGEMENT OPPORTUNITIES

WELCOME KIT

Q1 NEWSLETTER

Q2 FAMILY FIRST OFFICE HOURS

Q2 EDUCATION WEBINAR FOR MANAGERS,
DISABILITY & LEAVE MGMT TEAMS

Q3 SOCIAL MEDIA POST

Q3 FAMILY FIRST OFFICE HOURS

Q4 ARTICLE/MEMBER TESTIMONIAL

Innovating the Market

Leveraging our expertise to enhance the caregiving experience

HOLISTIC APPROACH

- + Expanding our Financial Platform
- + Global Expansion
- + Enhanced culture training for Care Experts

INNOVATIVE TECHNOLOGY

- + Remote monitoring device integration
- + Chat box functionality
- + User interface enhancements

EMPLOYEE SUPPORT

- + Mental health integration
- + Rx adherence support and solution
- + Condition specific targeting

EMPLOYER SUPPORT

- + SDOH initiatives
- + Nationally recognized DE&I initiatives
- + Deeper integration with other benefit vendors

Thank you for your partnership!

And a thank you from your caregiving employees...

"I would have had to fly to California to oversee my mom's care coordination without Family First. They helped coordinate home care and follow-up appointments with her doctors."

"My brother was handling my mom's return home after a recent hospitalization. He was overwhelmed and stressed out. Family First was able to assess my mom's needs, put support in place, and help my brother with his anxiety. Such a blessing!"

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