



2021 Year In Review

Forging Ahead

Over 1 Million Grants Awarded



HEALTHWELL
FOUNDATION®

When health insurance is not enough.®



2021 Year In Review: Forging Ahead — Over 1 Million Grants Awarded — Thanks to Your Support!



As we continued to navigate our way through the challenges of the COVID-19 public health crisis for the second consecutive year, we were humbled by the dedicated support we received from our individual and corporate donors. In 2021, their continued generosity and unwavering trust allowed us to serve tens of thousands of underinsured Americans who would have otherwise forgone life-changing, potentially lifesaving, medical treatments simply because their health insurance was not enough. We believe their trust is a direct result of the integrity and high standards with which we operate. Thank you for allowing the HealthWell Foundation to fill a critical, unmet need, for those who have nowhere else to turn.

Individual and corporate contributions of more than \$538* million allowed us to provide a record amount of financial assistance to a record number of patients in 2021. We awarded over \$818.4 million in medication copayment and insurance premium assistance through close to 185,500 grants to over 175,600 underinsured Americans - a growth of more than 6,500 patients over 2020. We also launched or reopened 18 funds across a variety of disease areas.

Not only did we set new records in both patients assisted and grants made in 2021, but we also reached a milestone of awarding more than 1 million grants to nearly 728,000 patients since awarding our first grant in 2004.

We continued to maintain the highest ethical standards as the cornerstone of our operations and to run our programs in full compliance with federal guidance that governs the copayment assistance industry, just as we have done since our inception in 2003. Our transparency and efficiency continued to receive external recognition. In 2021, we were honored to:

- Rank 27th on *Forbes'* 2021 list of The 100 Largest U.S. Charities.
- Be recognized by *Forbes* as one of only 13 charities nationwide to achieve a 100 percent fundraising efficiency rating.
- Score 100 out of 100 on Charity Navigator's Encompass Rating System.
- Be awarded the 2021 GuideStar Platinum Seal of Transparency.
- Rank as a 2021 Top-Rated Charity by GreatNonProfits.

Funds Open During 2021

- Acromegaly
- Acute Myeloid Leukemia
- Adrenal Insufficiency
- Amyloidosis
- Amyotrophic Lateral Sclerosis
- ANCA-Associated Vasculitis, and Granulomatosis with Polyangiitis
- Asthma
- Bladder and Urothelial Cancer – Medicare Access
- Bone Metastases – Medicare Access
- Breast Cancer – Medicare Access
- Cancer-Related Behavioral Health
- Chemotherapy Induced Neutropenia – Medicare Access
- Chronic Heart Failure – Medicare Access
- Chronic Lymphocytic Leukemia
- Chronic Myeloid Leukemia – Medicare Access
- Colorectal Carcinoma – Medicare Access
- Congenital Sucrase-Isomaltase Deficiency
- COVID-19 Frontline Health Care Workers Behavioral Health
- COVID-19 Insurance Premium Payment Assistance
- Cushing's Disease
- Cystic Fibrosis Treatments
- Cystic Fibrosis Vitamins and Supplements
- Cytomegalovirus Disease – Prevention and Treatment
- Dupuytren's Disease
- Giant Cell Arteritis or Temporal Arteritis – Medicare Access
- Gout - Medicare Access
- Gout Travel Fund
- Head and Neck Cancer – Medicare Access
- Hepatitis C
- Homocystinuria
- Hypercholesterolemia – Medicare Access
- Hyperoxaluria
- Immunosuppressive Treatment for Solid Organ Transplant Recipients – Medicare Access
- Lambert-Eaton Myasthenic Syndrome
- Macular Degeneration (Wet and Dry)
- Mantle Cell Lymphoma
- Melanoma – Medicare Access
- Movement Disorders – Medicare Access
- Multiple Myeloma – Medicare Access
- Multiple Sclerosis – Medicare Access
- Myelodysplastic Syndromes – Medicare Access
- Neurocognitive Disease with Psychosis – Medicare Access
- Non-Small Cell Lung Cancer – Medicare Access
- Nontuberculous Mycobacterium – Medicare Access
- Ovarian Cancer – Medicare Access
- Pancreatic Cancer – Medicare Access
- Pediatric Assistance
- Peyronie's Disease
- Porphyrias
- Post Menopausal Osteoporosis – Medicare Access
- Prostate Cancer – Medicare Access
- Pulmonary Fibrosis
- Pulmonary Hypertension – Medicare Access
- Renal Cell Carcinoma – Medicare Access
- Secondary Hyperparathyroidism
- Sickle Cell Disease
- Small Cell Lung Cancer – Medicare Access
- Systemic Lupus Erythematosus
- Tardive Dyskinesia – Medicare Access
- Urea Cycle Disorders
- Urticaria
- Wilms' Tumor



In 2021, We Were Proud to Have:

- Launched or re-opened 18 funds, including new funds to assist Medicare patients living with Myelodysplastic Syndromes, Neurocognitive Disease with Psychosis, Pancreatic Cancer and Pulmonary Hypertension.
- Launched a HealthWell-sponsored COVID-19 Frontline Health Care Workers Behavioral Health Fund to provide grants of up to \$2,000 to assist frontline health care workers in covering their out-of-pocket treatment-related copayments for prescription drugs, counseling services, psychotherapy, and transportation needed to manage COVID-19 related behavioral health issues.
- Provided financial assistance to the families of over 1,170 children living with chronic or life-altering conditions through our HealthWell Pediatric Assistance Fund®.
- Assisted more than 130 oncology patients seeking behavioral health services through our Cancer-Related Behavioral Health Fund.
- Continued to operate more than 60 funds in a variety of disease areas, including multiple funds in oncology, and our special initiative funds in behavioral health and pediatrics.
- Strengthened the diversity and number of our individual donor base to over 50,000 donors with more than 17,000 giving in 2021, resulting in a record high year-end public charity percentage.
- Maintained operational efficiency by programming our grants with an overhead rate of less than 2.61% foundation-wide, while never using any donor dollars to pay administrative fees.
- Enhanced our website with the launch of our [compliance page](#), which features videos from our Board members and senior management team.
- Launched a Spanish language application, expanded content on our [Español page](#), and created a new version of our [Disease Funds list](#) in Spanish.
- Increased our social media presence across all platforms by growing our online audience to over 9,800 followers, resulting in over 3,279,000 impressions, almost 33,000 engagements and over 16,100 clicks.
- Increased our Real World Health Care blog following to 18,879 users, resulting in 25,691 pageviews in 2021.
- Spread our message nationally with dozens of alliance partners, resulting in close to 684 million media impressions from placements in major news outlets, including *Reuters*, Yahoo! Finance, MarketWatch and *Washington Business Journal*.
- Welcomed David F. Ertel to the Foundation's Board of Directors.
- Enhanced our staff with the addition of two new members to our corporate team.

Our Commitment to Compliance and Transparency

Like other independent charitable patient assistance programs (CPAPs), the HealthWell Foundation receives the majority of its donations from the pharmaceutical industry. As a result, as with other CPAPs, HealthWell is structured, governed and operated in compliance with federal legal and regulatory requirements and is required to operate independently from our corporate donors. We are subject to oversight by the U.S. Department of Health and Human Services, Office of Inspector General (OIG), whose mission is to protect the integrity of federal health care programs, and which provides strict guidance for how CPAPs should be structured to maintain compliance with these requirements.



We have and will continue to follow that guidance to the letter. Maintaining compliance, independence, and transparency has been our standard operating policy since our inception and is essential to our ability to serve our mission. To learn more about HealthWell's OIG Opinions, financial reporting, and program audit summaries, visit: <https://www.healthwellfoundation.org/about/financials/>.



HWF Direct, LLC: Forging Ahead

Compassionate, Responsive and Quality Care



In 2018, we launched our dedicated contact center, HWF Direct, LLC, with the mission to provide unparalleled, compassionate customer service through innovative cloud-based contact center solutions and an empowered, dedicated staff. Our strength as a team continues to set us apart from other contact centers. Providing the highest quality customer service and ensuring that our specialists take the time needed to resolve caller issues within the first contact is, and will always be, our number one priority.

As the need for HealthWell's services continued to grow, we expanded our team and were honored to welcome close to 50 new members in 2021. As a result of this growth, HWF Direct now consists of close to 150 highly-trained, mission-driven professionals, who serve as the first line of communication for those who reach out to us for assistance.

We set the highest performance standards, which have been applauded by the patients we serve, as well as by their providers and pharmacies. Our key performance metrics focus on providing compassionate, responsive, and quality care to each and every caller. We are proud to share that, during 2021, the team:

- **Received: 491,911 calls through our hotline while maintaining a call capture rate of 93.5%.**
- Maintained a 98% staff retention rate, with 95% of staff working remotely for the majority of 2021.
- Increased staffing from 105 employees at the end of 2020 to 147 at the end of 2021.
- Completed an organizational restructuring to reflect the patient journey to ensure frontline staff have a support system of subject matter experts.
- Enhanced our team through the promotion of a Program Director and expanded our Leadership Team to support frontline staff.
- Streamlined multiple processes with a focus on providing a compassionate, compliant, and completely satisfactory experience for those we serve.
- Enhanced our Quality Assurance evaluation and auditing process.
- Created 186,438 grants (includes withdrawn and cancelled grants) via the hotline, online applications, and portal.
- Responded to:
 - 134,264 copay reimbursement/payment requests with an average processing time of less than seven business days.
 - 15,850 premium reimbursement/payment requests with an average processing time of less than three business days.
 - 39,357 email questions/requests with same day response time.
- Completed over 3,918 internal audits/reviews of our team's handling of calls, payments, and other tasks demonstrating that we are successfully meeting our internal standards for providing a compassionate, compliant, and completely satisfactory experience 93% of the time.

We are proud of what we have accomplished and thankful for the ability to make such an impact. We appreciate every stakeholder with whom we interact: our donors, our provider and pharmacy networks, our patient advocacy organization partners, our dedicated employees, and especially our patients. Thank you for another extraordinary year.



More than 37,000 callers assisted each month



Actively managed over 185,400 grants



Average monthly calls handled by IVR: 17,826



Calls into hotline: 491,911



Calls handled by specialists: 238,337



Average inbound call capture rate: 93.5%



Average call talk time: 8–10 minutes



Provided a compassionate, compliant, and completely satisfactory experience 93% of the time.



We pride ourselves on high-quality customer service and ensuring that our specialists take the time needed to resolve caller issues within the first contact.

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