



gratitude

Carol E. Ware Center
Caron, Pennsylvania

2020
annual report



Douglas Tieman



Dr. Thomas Flynn

GRATITUDE

for your partnership and loyalty to Caron

Dear Friends,

We've decided to focus this annual report on the spirit of gratitude. We are deeply thankful for each member of our Caron staff, medical, and clinical teams who have kept our patients and families safe during COVID-19. Our environmental services, grounds, and facilities crews stepped up with incredible energy and resiliency to keep our doors open and our campuses thoroughly sanitized. Our Sodexo food services team continued to provide healthy and delicious meals while following all CDC guidelines. And our development team continued fundraising efforts that exceeded our annual goal.

The generous philanthropic support of our donors has enabled Caron to face the immense challenges of COVID-19 with courage and confidence due to our highly trained and experienced staff. Despite the cancellation of in-person meetings and events, our dedicated alumni never stopped supporting one another at a time when the threat of the disease of addiction due to isolation was never more significant. Thank you for your texts and calls to check on others. Undoubtedly, your compassion saved lives.

Most of us have experienced the loss of a family member or friend due to the pandemic, or if not, we know an individual who has lost someone dear. Although our shared grief is palpable, we will do our best to continue to honor the legacy of those lost to the virus by dedicating ourselves to our life-saving work with the disease of addiction.

Your support allows us to pursue this goal. In 2020, your generosity provided treatment to more than 7,500 families through Caron's treatment centers in Pennsylvania, Florida and our regional recovery offices. We've served thousands of more individuals through support groups and prevention and education programs because of your kindness. With \$10.3 million in patient scholarships awarded this year, we continue to be a leader in the industry while staying true to our values and focusing on our mission, Recovery for Life.

More positive news for 2020 included the Pennsylvania opening of the Carol E. Ware Center, which houses Caron's transformative Grandview Women's Program. Construction in Florida began on The Keele Center. We have raised \$24M, which is close to our Raise The Roof milestone of \$25M. We will need to get to \$30M to reach our final goal. Additionally, the board approved plans to begin the Fran and Doug Tieman Center for Research.

Following the 2021 RxSummit, "The Philadelphia Inquirer" covered ground-breaking 90-day outcomes released by Caron and Independence Blue Cross (IBC) in an April 2021 article. Caron's readmission rates were 5.6% for 90-days post-treatment for IBC 2019 members, which was significantly better than IBC's six other unidentified providers in the cohort, ranging from 11.6% - 25.7%. A low readmission rate of 5.6% means having a 94.4% recovery rate at 90-days and a better quality of life. We define the rate of recovery as not needing detox or readmission to the same/higher level of care. The high rate (94.4%) of 90-day post-treatment recovery shows that Caron's approach on quality, multidisciplinary treatment protocols with a median in-patient stay of 25 days, combined with a long-term disease management plan, works.

These accomplishments would not have been possible without your generous support. Thank you! Your confidence in Caron Treatment Centers continues to inspire and move our team forward to serve even more families. Thank you again for your partnership and loyalty to Caron. May we look forward to a brighter, healthier year ahead.

Sincerely,

Douglas Tieman
President/CEO

Dr. Thomas Flynn
Chairman, Board of Trustees

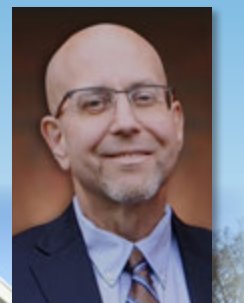
A MESSAGE FROM JOSEPH M. GARBELY, D.O., DFASAM

EXECUTIVE VP & CHIEF MEDICAL OFFICER

The Neag Medical Center staff played an important role in dealing with COVID-19 by never closing its doors to patients. From the onset of the COVID-19 pandemic to the present, all entering patients were carefully screened, isolated, tested, and admitted according to stringent guidelines. In addition, all patient-facing staff in Neag Center immediately adopted the use of mitigation measures to ensure the safety of our patients and each other.

Our medical team of doctors and nurses did an excellent job providing treatment while dealing with COVID-19. Medical and nursing staff were aware of contagion risks but never hesitated for a moment to personally meet with and examine patients. Their kind and compassionate approach keenly show their commitment to eliminate suffering due to addiction.

The medical and nursing departments are incredibly grateful to Caron leadership and the Board of Trustees for their unwavering support of our staff's needs regarding safety equipment, communication procedures, and campus regulations that were in place to protect everyone.



DOUG TIEMAN ANNOUNCES RETIREMENT

In August of 2020, Doug Tieman announced he will be stepping down as President and CEO of Caron on June 30, 2021 after 26 years in that position. Doug will continue to be involved with Caron as Sr. Consultant and President Emeritus.

Thank you to the Board of Trustees for providing me an opportunity to serve the Caron mission as President and CEO for the past 26 years. The Leadership Team, all of the employees past and present, the alumni, and the community I have served have been terrific partners in helping Caron achieve its mission of "Recovery for Life." I am also grateful that the Board has asked me to continue to be involved as Sr. Consultant to the President. I look forward to working with Brad Sorte when he takes over as President and CEO on July 1st.

CARON APPOINTS BRADLEY F. SORTE AS NEW PRESIDENT AND CEO



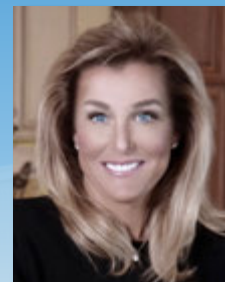
In December of 2020, Caron Treatment Centers appointed Bradley F. Sorte to President and CEO effective July 1, 2021. Currently Chief Strategy and Growth Officer for Caron, Brad previously served as the executive vice president and managing director of Caron's Florida continuum after starting as a family therapist at Caron Renaissance and a primary therapist at Ocean Drive.

An active member of both the Philadelphia and Palm Beach chapters of the Young Presidents' Organization, Brad serves on the nonprofit's board for Palm Beach. Brad holds both a Master of Social Work and a Master of Business Administration from Florida Atlantic University. He earned a Bachelor of Arts in psychology from Rice University and a Bachelor of Science in legal studies from Kaplan University.

THE KEELE CENTER UPDATE

As Campaign Chair of the Open the Door Campaign, I'm overwhelmed by the generous gifts of \$24 million. The Keele Center construction has begun! We're moving closer to our \$25 million Raise the Roof milestone. As you can see, our vision for this state-of-the-art treatment center is well on its way to becoming a reality.

Now, more than ever, we must have enhanced treatment services. Addiction numbers are on the rise due to COVID-19, and we are more committed than ever to opening The Keele Center to help as many people as possible. But we still need to raise \$6 million for the Open the Door campaign before January 2022. If addiction has touched you or your family, please make a difference today by supporting future Caron families. Let's Raise the Roof of The Keele Center together.



Cortney Beebe
Campaign Chair

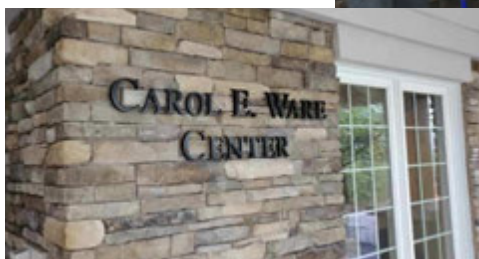
CAROL E. WARE CENTER OPENS ON PENNSYLVANIA CAMPUS

Led primarily by women, Caron's transformative Grandview Women's Program at the Carol E. Ware Center delivers specialized treatment that empowers women to address addiction-related issues and underlying co-occurring disorders in a comfortable, emotionally secure space. With a highly educated and experienced full-time medical and therapeutic staff plus a robust network of active alumni, the new Carol E. Ware Center helps women rediscover and fulfill their life purpose.

The concierge level of care at the Grandview Women's Program features intensive, personalized counseling, small-group therapy with like-minded women, and experiential work in an intimate, trauma-sensitive environment. Patients will feel at ease among other women with similar lives and backgrounds.



Carol Ware Center Ribbon Cutting Ceremony



REGIONAL EVENTS GO VIRTUAL

We are incredibly grateful for our generous donors during such unprecedented conditions due to COVID-19. As you know, Caron's exciting fundraising galas and dinners all had to go virtual this year because of the pandemic. Typically, regional events raise more than \$4M annually to support our treatment scholarship funds. And due to the impact of COVID-19 on people struggling with addiction and mental health issues, fundraising has become even more critical. We traditionally honor community leaders at our regional events, and we needed to celebrate and recognize these individuals even though we could not be together in person. Thanks to our generous donors who supported our 2020 virtual events and remained financially supportive, we exceeded our fundraising goal for our regional events! As we look forward to hosting our 2021 events live, we will never forget your support. Thank you.

New York

September 29, 2020

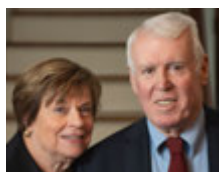


John P. Fitzsimons
Richard J. Caron
Award of Excellence
Honoree
Will Healy
Thomas J. Moran

Caron Music Award

Berks County

October 12, 2020



John R. Post, Sr.
Richard J. Caron Award of Excellence
Honoree
Olsen Design Group Architects
Partner in Recovery

Washington, D.C.

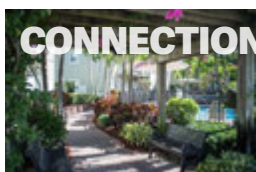
October 28, 2020



Admiral James "Sandy" Winnefeld, USN (Ret) & Mary Winnefeld
Richard J. Caron Award of Excellence
Honorees

Florida

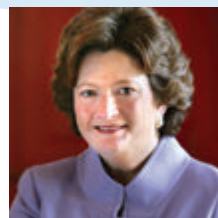
November 21, 2020



Renaissance & Ocean Drive
Gratitude Virtual Celebration

Philadelphia

December 1, 2020



Carol E. Ware
Richard J. Caron Award of Excellence
Honoree

Atlanta

November 10, 2020



Andrea & Boland Jones Honorees
5th Annual Sliders and Sweets
Golf Tournament

GRATITUDE FOR OUR FRONTLINE HEROES

The following quotes from several of Caron's leaders illustrate how our various teams managed and provided excellent care during COVID-19. Our frontline heroes went beyond the call of duty this year. Many worked overtime hours, floated to other departments when necessary, assisted with getting safety equipment, provided constant staff communication, followed the new rules and regulations on campus closely, and supported each other to ensure patients and staff stayed healthy and safe. As a result, we had very few COVID-19 cases on campus, and when we did, the team did all they could to protect others while caring for those with the virus.

The Alumni Team worked tirelessly to ensure the connection with our alumni and families was stronger than ever by increasing the number of outreach efforts to record highs, finding creative ways to come together virtually, and developing unique and timely programming. Likewise, alumni and family members served as recovery contacts, participated in weekly fellowship and support groups, and stayed connected through countless Zoom meetings, calls, and texts."

Aly Reis
Corporate Director of Alumni Services

I am grateful for the new ways we are reducing shame while embracing and tending to the spiritual needs of patients, families, colleagues, and ourselves as we recognize the ways the pandemic has escalated substance use disorders and other mental health concerns. As valued members of the multidisciplinary, clinical round table, we share empathy and solidarity with grieving individuals through specialized programming."

Rev. Jack Abel
Sr. Director of Spiritual Care

I am grateful many departments: Facilities for going into "hot zones" to pick up patients, take them to off-campus appointments, and move groups around campus; Maintenance for keeping our buildings functioning; Grounds for beautifying our exterior; and Environmental Services for all the disinfecting and deep cleaning. I'm also thankful for Procurement for coordinating all of the Personal Protective Equipment."

Dave Schulze
VP Support Services

I am honored and proud to work alongside our Florida staff, which has tirelessly held patient care paramount, practiced mitigation strategies both at work and at home, and made countless personal sacrifices to ensure the safety of themselves, our staff, and patients. Their professional efforts have not only been inspiring, but they have also successfully prevented the spread of the virus into our Caron community."

Dr. Phoenix Adams
Sr. Executive Director Caron FL

While other treatment centers were closing their door to patients, our medical department, along with our compliance and risk officers, kept our doors open while treating our patients in the safest, most medically sophisticated way. Our clinical team never missed a beat -- showing up during the scary, anxious initial days of the outbreak and maintaining best-in-class clinical care under difficult circumstances ever since."

David Rotenberg
EVP, Chief Clinical Officer

Watching Caron's Human Resource and Training staff adapt and adjust to COVID-19 was deeply gratifying. From daily "contact tracing" (some days up to 15 staff members were out) to moving our recruiting, training, and onboarding of staff to virtual platforms, this group just kept going. I am incredibly proud of our team!"

Kris Bashore
Chief Administrative Officer

Our Environmental Services staff met the challenges of developing and implementing cleaning protocols based on the CDC's ever-evolving guidelines for best practices. Our frontline staff, even when short-handed due to COVID-19-related absences, performed daily disinfection of common area surfaces and conducted intensive deep cleaning processes when positive cases were on campus."

Scott Angstadt
Environment Services Supervisor

Thank you to our Development and Alumni teams for your tremendous efforts in service to others and thank you to our generous donors who provided much needed COVID related supplies, monetary donations, and words of encouragement. As difficult as this year has been, I was reminded time and time again just how thoughtful, creative and mission driven our team is at Caron as well as our supporters from across the country."

Seán Lavelle
EVP, Chief Development Officer

I am grateful for our Education Alliance staff who demonstrated grace, dedication, commitment, and resilience to deliver comprehensive, evidence-informed, and innovative strategies for substance use education and supportive services along the full continuum of care. We worked collaboratively with partners to create virtual school programming, adapt our curriculum, and engage families in new ways to serve youth best when they needed us most."

Tammy Granger
VP of Education

ENDOWMENTS & RESTRICTED FUNDS

James L. Abernathy Endowed Scholarship Fund

James J. Billerbeck Endowed Scholarship Fund

Breakthrough Alumni Endowed Scholarship Fund

Harris Brodie Endowed Scholarship Fund

Steven C. Calicchio Endowed Fund for Music
and the Creative Arts

Caron Renaissance Endowed Scholarship Fund

Caron Renaissance Family Programs Endowed Fund

Catherine Caron Fund

Richard J. Casey, Jr. Memorial Endowed Scholarship Fund

Community Education Project Endowed Fund

The Coogan Family Scholarship for Hope

COVID-19 Scholarship Fund

Kevin Phillip Cutler Endowed Scholarship Fund

Anthony Dimick Endowed Fund

Dodds Family Endowed Scholarship Fund

Duffy Family Endowed Scholarship Fund

Eddie's Gift Endowed Scholarship Fund

First Responders Program Fund

John J. Flannery Endowed Scholarship Fund

Forst Family Endowed Scholarship Fund

Fraternal Order of Police Endowed Scholarship Fund

Bethany R. Granata Endowed Scholarship Fund

Grauer Family Scholarship Fund

Gregg R. Grossman Endowed Scholarship Fund

Gregg R. Grossman Scholarship & Special Programs Fund

Adam and Ben Hock Scholarship Fund

Justin Boyd Howard Endowed Scholarship Fund

Rev. William J. "Father Bill" Hultberg
Endowed Scholarship Fund

I'll Watch Over You Endowed Scholarship Fund

Boland T. Jones Family Scholarship Fund

Richard D. Kelley Endowed Scholarship Fund

Ann Marie and McKaye Kelly Endowed Scholarship Fund

Nicholas D. Klarsfeld Endowed Scholarship Fund

Neil Lasher Music Fund

Charles A. Leeds Jr. Endowed Scholarship Fund

Legal Professional Training and Promotion Fund

Dennis Leibowitz Endowed Scholarship Fund

Werner G. Maeder Endowed Scholarship Fund

Ellen and Christopher Maguire Scholarship Fund

Sam and Kay McCullough Family
Endowed Scholarship Fund

Geoffery McKernan Endowed
Recovery Care Services Fund

Medical Research Director Position Fund

Miller - Skibbie Family Endowed Scholarship Fund

James Curtis Moffatt Memorial
Endowed Scholarship Fund

Martin E. Mulhern Endowed Scholarship Fund

Neag Family Endowed Scholarship Fund

Vivian Elaine Niceley Endowed Scholarship Fund

Mark R. Nicoletti Jr. Scholarship Program

Ramonas Family Spirituality Endowed Fund

Recovery Care Management Endowed Fund

Patrick E. and Randy Rogers Endowed Scholarship Fund

Arlene and Michael Rosen Fund for Veterans

Ed Satell Family Endowed Chair for Children and
Adolescent Education

Dominick R. Scalera Endowed Scholarship Fund

Dr. Mary Ann Scheuhing Scholarship Fund

The Silverman Family Foundation Scholarship Fund

Ivan L. Small Endowed Scholarship Fund

Frederick A. Smith Endowed Scholarship Fund

Springer Family Fund for Family Education

The Subak Family Endowed Scholarship Fund

James W. Taylor Endowed Scholarship Fund

Taylor Family Endowed Scholarship Fund

Tiagwad Family Endowed Scholarship Fund

Tieman Research Fund

Tieman Research Endowed Fund

Matthew Versagli Memorial Endowed Scholarship Fund

Suzanne S. Voisin Endowed Scholarship Fund

The von Seldeneck Family Scholarship Fund

Wall Family Endowed Scholarship Fund

Carol E. Ware Chair of Trauma Treatment

Zelnick Family Endowed Scholarship Fund

Ziff Family Endowment Fund

2019-2020 FINANCIAL HIGHLIGHTS

Total Revenue **\$123.2 million**

Net Patient Service Revenue	\$105 million
Contributions & Grants	\$16.2 million
Other Revenue	\$2 million

Total Expenses **\$120.6 million**

Program Activities	82.2%
General & Administrative	15.4%
Fundraising	2.4%

Net Revenue Over Expenses **\$2.6 million**

Total Contributions Received **\$16.2 million**

Annual Scholarships	28%
Special Programs	25%
Capital	38%
Endowment	9%

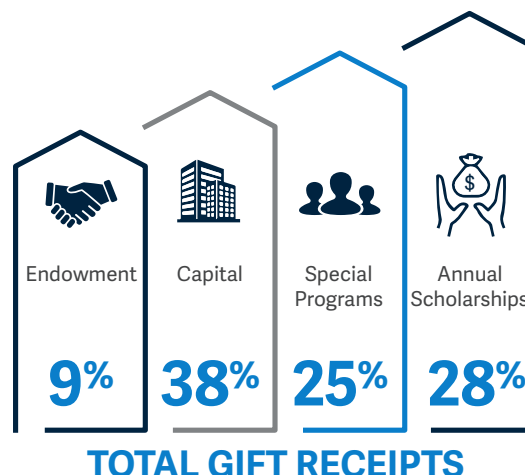
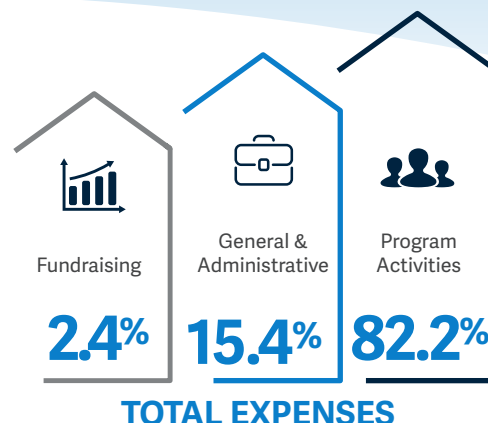
Annual Charity Care **\$10.3 million**

This amount is equivalent to 9.8% of Caron's net patient revenue

915 patients and families benefited from charity care in the 2019-2020 fiscal year.

Total Endowment Portfolio **\$43.2 million**

Named Funds Value	\$21.4 million
Board Designated Funds Value	\$21.8 million



Individuals and Families Served

Inpatient & Residential Treatment

Caron Pennsylvania - 2,212
Caron Renaissance - 380
Caron Ocean Drive - 120
Total - 2,712

Outpatient Services

Caron Counseling - 609
Caron Atlanta - 152
Caron Florida - 287
Caron Philadelphia - 210
Total - 1,258

Family Services

Caron Pennsylvania - 2,893
Caron Renaissance - 600
Caron Ocean Drive - 373
Total - 3,865

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