

Validation

Training Institute



‘Connecting Heart to Heart with Older Adults’

2016 Annual Report

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Naomi Feil, VTI Founder



Vicki de Klerk-Rubin
Executive Director

Message from the Executive Director

At the end of 2013, the Validation Training Institute Board of Trustees and I began strategizing for the future with the creation of a five-year strategic plan. At that time, we set specific goals that focused on our core objectives as an organization. The following 'Annual Report' is actually a three-year update to highlight some of our accomplishments relating to those plans.

As a volunteer executive director (ED), I could not have done my job well without the support of Jana Stoddard, VTI's manager. Her unfailing commitment to VTI and willingness to take on new projects has been instrumental in VTI increasing its earned income and improving our online presence. Dan Hiestand, VTI's new grant writer, has pushed me, nudged me and guided me into being a better ED and for that, I am very grateful. Dan has made VTI grant ready, starting from scratch, with a positive attitude and expertise.

We look forward to making more partnerships with memory care communities, creating more Authorized Validation Organizations (AVOs), starting our research project, beta testing the Modular Learning curriculum, revising our Quality Manual (which will be published online, making it much more accessible and a greater resource to Validation Teachers and AVOs), and hosting the first (of many) VTI-AVO international meetings. In other words, continuing our growth and development from a "mom 'n pop shop" to a more professional, international organization.

Thank you for your support in our efforts to improve the lives of older adults experiencing cognitive decline and their caregivers.

—Vicki de Klerk-Rubin, VTI Executive Director

WHAT WE DO

VTI maintains an international network of certified professionals and regional Authorized Validation Organizations (AVOs) providing education, training and certification programs consistent with our quality standards. It's a network that includes:

- More than 380 Certified Validation Teachers and Presenters
- Twenty-one AVOs in 12 countries
- More than 6,000 Validation-certified caregivers practicing in dementia care centers and homes worldwide
- Individuals at more than 10,000 dementia care communities worldwide who practice Validation
- More than 88,000 people who have attended Validation workshops

Additionally, VTI produces and distributes authorized Validation content for course curricula, books, videos and related media in nine languages. As custodians of the Validation Method, VTI encourages research and public awareness of the method, its role in excellent eldercare and the work of its founder, Naomi Feil.

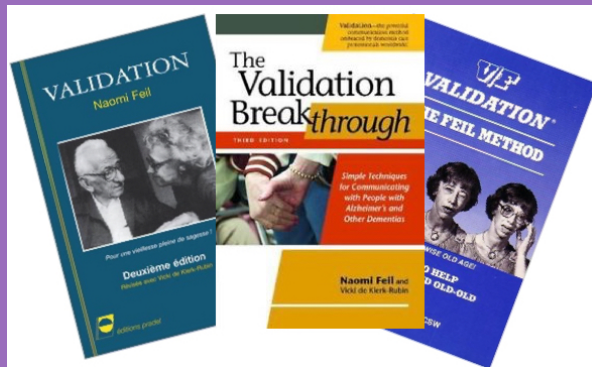
Highlights of our efforts to disseminate information on the Validation Method include the following:

- Since 2009, 730,000 visitors to our Web site
- 80,000-plus Validation books have been sold
- Five-plus published research studies have found Validation effective
- Articles on Validation have appeared in *The New York Times*, *The Washington Post*, *The Wall Street Journal*, *The Huffington Post*, *The Telegraph* (UK), CNN, TEDx AmsterdamWomen (Naomi Feil Presentation), China Central Television (CCTV), *Journal of Humanistic Psychology*, *Provider Magazine* (American Health Care Association) and *The Gerontologist*



OUR MISSION

The Validation Training Institute is a not-for-profit organization that nurtures respect, dignity and well-being in the lives of older adults experiencing age-related cognitive decline and their caregivers by advancing knowledge, values, education and research rooted in the Validation Method.



OUR VISION

VTI's vision for the future is that every caregiver and older adult experiencing age-related cognitive decline will feel the joy and love of meaningful communication.



OUR HISTORY

Validation began as the personal practice of a brilliant individual, Naomi Feil. With the help of a few supporters she created the Validation Training Institute (VTI) as a vehicle for spreading information on the method, as well as training practitioners and trainers.

Over the past 35 years, VTI has created and delivered constantly evolving training programs, published four books in 12 languages, created films and built an international network of partnerships. Validation, once a maverick concept, is comfortably in-synch with contemporary thinking as Feil's concepts have inspired a generation of 'person-centered' eldercare.



VTI Executive Director Vicki de Klerk-Rubin in a Validation group session.



Naomi connecting with a resident

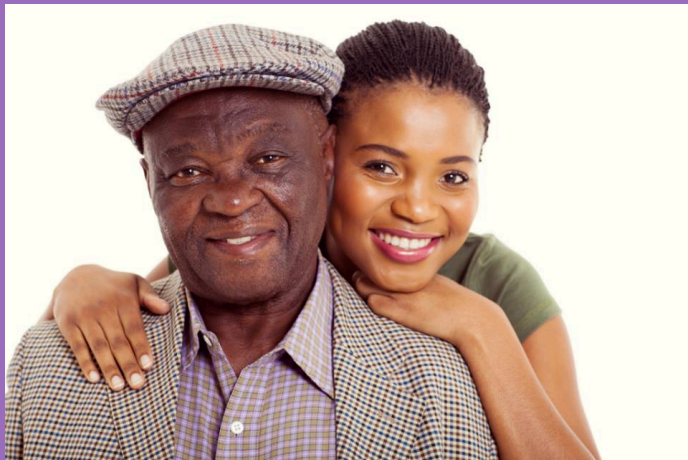
Laying the groundwork for VTI's future

Recognizing the need and potential for increasing the visibility and impact of the Validation Method, VTI began work on a strategic plan to expand the reach of the organization in 2013. Those first exploratory discussions identified five areas of focus fundamental to this goal. They included:

1. Build long-term financial stability
2. Maintain excellent performance
3. Encourage and support research
4. Create more high-quality training materials, available in all AVO languages
5. Develop a productive, professional Board of Trustees



I. To build long-term financial security, we are taking a three-pronged approach.



(I) Increase earned income by developing more products to sell

- At Ed Feil's suggestion, VTI took on the distribution of Validation books and DVDs from Edward Feil Productions in 2015.
- In 2014, VTI developed and successfully tested its first "Internet-Supported Level I" certification course. No other organization offers dementia care training that combines both online learning (using webinars, videos) and in-person training. This unique combination integrates the acquisition of practical skills, new knowledge and inspiration, which are hallmarks of our quality standards. We are proud that VTI launched its fourth Internet-Supported Level I course in January 2017, in partnership with Meridian Senior Living and Alzheimer's of Orange County.
- Building on this idea, we developed the "Internet-Supported Course for Family Caregivers." This course hopes to address the special needs of family members who are caring for their relatives.
- And—in answer to the growing need for shorter, less expensive courses that make Validation training more accessible to Care Facilities while maintaining our quality standards—VTI has developed a "Modular Learning Curriculum."

Goal for 2017

Beta test both the Internet-Supported Course for Family Caregivers and the Modular Learning Curriculum to ready them for wider use in the future.

I. To build long-term financial security, we are taking a three-pronged approach.

(2) Conduct professional fundraising

At the end of 2015, VTI ran its first fundraising campaign, which garnered \$ 55,000. This made it possible to hire our first part-time grant writer and fundraising professional for two years.

Goal for 2017

Now that VTI is ready to apply for and receive grants, we will pursue funding to support three projects: a Validation research proposal, beta testing of new curricula and translation of the Quality Manual in various languages.

(3) Increase royalty income by revising Authorized Validation Organization (AVO)¹ contracts and increasing the number of AVOs

- In 2014, VTI developed a brochure to help guide newly forming AVOs. This was distributed to Validation Teachers in the U.S.
- In 2015, VTI developed a new AVO contract that provides a steadier stream of royalty income for the organization.
- In 2016, VTI added AVOs in Slovakia and China and updated contracts with half of the AVOs.

Goal for 2017

We hope to add new AVOs in the U.S., Great Britain and Israel, while updating contracts with the remaining AVOs.

¹ Authorized Validation Organizations have contracts with VTI giving them materials and authorization to offer certification courses, for which VTI receives a 5% royalty on their income.

Follow our blog for the latest news!
www.vfvalidation.org

2. Maintaining Excellent Performance



As we grow, excellent performance requires excellent communication within our organization and with the public. To that end, VTI hired part-time manager Jana Stoddard in 2013. Jana's skills keep the VTI Education Committee¹ on track, our Web site updated, our FaceBook account active and interesting, and VTI's responses to inquiries prompt, accurate and informative. Jana has also taken over technical assistance during all Internet-Supported courses.

Thanks to a generous donation by **IEQ Technologies**, our Web site is now hosted for free and was upgraded so it can now be easily used on mobile devices.

Goal for 2017

After a two-year process to revise of our Quality Manual, VTI will publish this document online in an easy-to-use new platform. The manual covers quality standards for every aspect of our nonprofit.



3. Encouraging and supporting research

The availability of good research spreads awareness and encourages acceptance of the Validation Method. Currently, VTI maintains an online listing of every research document on Validation that is received, in all languages.

Goal for 2017

We seek to receive a grant for a controlled, double-blind study on the efficacy of the Validation Method, in partnership with memory care communities and external research organizations and/or academic institutions.



I JUST KNEW IT WAS RIGHT...

“My view of the world and my work with elders experienced a tectonic shift in 2011 when I heard Naomi Feil speak for the first time. All of my personal and work interactions with older adults have been completely changed since then. Her approach involving empathy, communication, understanding that “behaviors” are the communication of needs, and dignity for those experiencing disorientation and an ‘avalanche of losses’ spoke viscerally to me. I just knew it was right. Further study and practice of Validation has confirmed this for me. Our worlds—the elders’ and those who interact with them—need the Validation approach. Our lives will be better for it.

— Stacey B. Hand, MA, Certified Validation Presenter

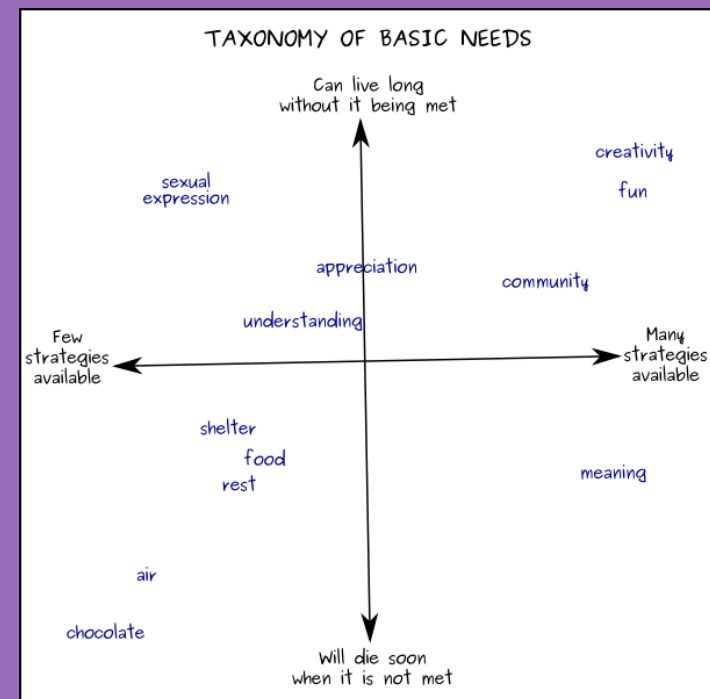
4. New training materials available in all AVO languages

- In 2013, VTI published “Co-training for Validation Teachers,” a booklet describing the regulations and process of becoming a certified Validation Teacher. This document answered international questions and formalized the quality standards.
- In 2015, VTI published, “Basic Human Emotions,” an exploration of the various theories which underpin Validation principles.
- In 2016, VTI published, “Who Can We Validate?” an exploration of how and when Validation can be used with people who have other forms of cognitive decline.

All these publications are translated into Chinese, English, French, German, Italian, Japanese, Slovak, Spanish and Swedish—the languages needed by our AVOs.

Goal for 2017

Our hope is to have the newly revised Quality Manual translated into all AVO languages, and translate the Modular Learning Curriculum into German and French to increase earned income and make training more accessible.



5. Board Development



In March 2016, Naomi was interviewed by Canadian Broadcasting Corporation's Dr. Brian Goldman at KLCC in Eugene, Ore.

Through 2013, all VTI's work was done by its small, volunteer Board of Trustees and the Validation Teachers/Masters around the world. A growth strategy required a reassessment of the role and composition of a suitable Board.

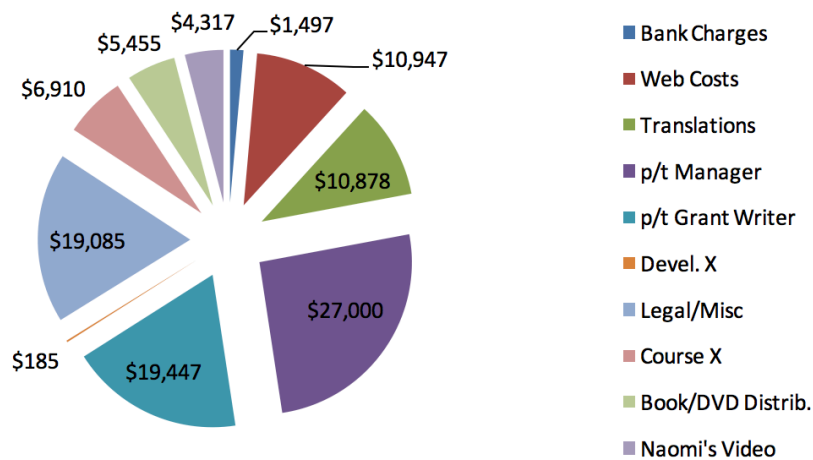
- In 2015, the responsibilities of the Board were reviewed, new Board development materials were developed and by November, three new Board members brought their expertise, energy and new ideas to the VTI Board.
- In 2016, a management sub-committee was formed to support the executive director in her work and a more active engagement of Board members in fundraising and supporting research was stimulated.

Goal for 2017

This year, we seek to add two more Board members who can actively engage in VTI's development.

FINANCIAL OVERVIEW

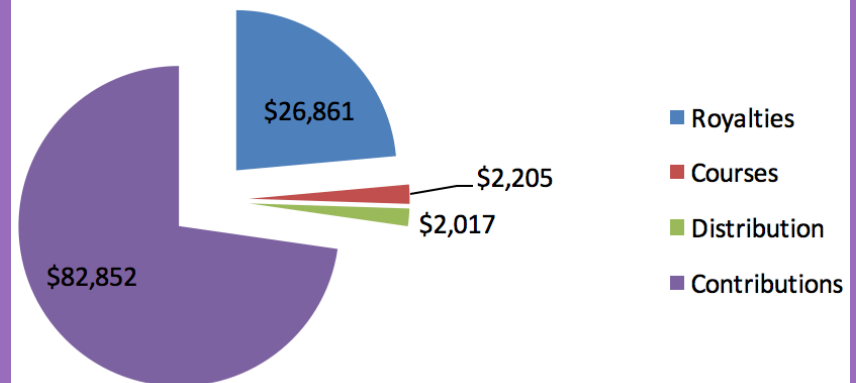
2016 Expenses



Want more info?

Visit VTI's "Financial Reports" section to get more information by visiting our Web site at <https://vfvalidation.org/financial-reports/>

2016 Income



THANK YOU, SUPPORTERS!

Since 2015, the following individuals, groups and businesses are considered major supporters of VTI (donations of more than \$250). Their donations allow us to reach those who benefit most from the Validation Method around the world. For a complete listing of all our donors, visit <https://vfvalidation.org/vti-donors/>

Scott Averil
Elkan Abramowitz
Nancy Bravman
Frances Bulloff
Kevin Carlin
Ed Feil
Naomi Feil
Nancy A. Gavin
Bruce D. Haims
Rachel Oestricher Bernheim
The Katcher Family Foundation
In Memory of Linda Kalver
Stephen Karl Klotz
Joseph T. Lambert
George M. Leader
George M. Leader Family Corp
Dirk van Leeuwen
Wendy Loren
James and Susan Marinello
Dane McGregor
Meridian Senior Living
The Musikantow Foundation
Vicki de Klerk-Rubin

SBSG Interior Design, LLC
Patricia B. Specter
Sunrise Senior Living
Polly Teeter
Diane Waldman



OUR STAFF AND BOARD

VTI Staff

VTI operations are primarily run by a four-person team and guided by a board of trustees.

- Vicki de Klerk-Rubin, Executive Director
- Jana Stoddard, Manager
- Dan Hiestand, Grant Writer & Development Professional
- Edward G. Feil, Webmaster and e-learning Coordinator

Board of Trustees

The VTI Board of Trustees is an 11-member body that meets quarterly for formal meetings, normally by teleconferencing. Trustees include members representing the health, education and technology sectors from around the U.S.

- Rita Altman, Chair of Education Committee (2007)
- Fran Bulloff, President (1995)
- Kevin Carlin, Treasurer (2015)
- Ed Feil, Webmaster and e-learning (2013)
- Naomi Feil, Founder (1981)
- Vicki de Klerk-Rubin, Secretary (2008)
- Stephen Klotz (2007)
- Hedwig Neu, VTI Representative to EVA (2013)
- Wayne Olson (2015)
- Harvey Sterns, Chair of Research Committee (1990)
- Charles de Vilmorin (2015)