

# Englewood Community Care Clinic Inc.



## SUMMARY

### Mission

To provide no-cost episodic medical services to the uninsured and working poor in the Englewood area.

### Contact Information

<b>Primary Address</b>	PO Box 189 Englewood, FL 34295-
<b>Alternate Address</b>	6868 San Casa Drive Englewood FL 34224
<b>Phone</b>	941 681-3765
<b>Email</b>	englewoodcareclinic@verizon.net
<b>Website</b>	www.englewoodclinic.org
<b>Facebook</b>	pages/Englewood-Community-Care-Clinic-Inc/176092872423858?ref=ts&fref=ts

### General Information

<b>Nonprofit</b>	Englewood Community Care Clinic Inc.
<b>Organization Does Business As (DBA)</b>	
Englewood Community Care Clinic	
<b>Tax Exempt Status</b>	Public Supported Charity
<b>Incorporation Year</b>	2010
<b>State Charitable Solicitations Permit</b>	Yes Mar 2018
<b>State Registration</b>	Yes May 2018

# BACKGROUND & NEEDS

## Impact Statement

### Top Accomplishments:

1. We opened our doors to serve patients in January 2011, and have seen more than 2,451 patients in 5,977+ patient visits to date.
2. Recruited 25 volunteer medical providers (physicians, physician assistants, registered nurse practitioners).
3. Recruited 30 volunteer nurses.
4. Partnered with Charlotte County Government as it provides space to operate our Englewood Community Care Clinic on Monday and Thursday evenings from 5pm to 8pm.
5. Received generous funding individual donors, private foundations and community organizations such as the Lemon Bay Sunrise Rotary Club, the Placida Rotary Club and the Rotary Club of Englewood for supplies, equipment and operating support.
6. Hired a part-time Clinical Director.
7. We were named the 2016 Nonprofit of the Year by the Sun Coast Media Group.
8. Received a \$38,000 impact grant from the Plantation Community Foundation to purchase an in-house laboratory that enables our volunteers to take blood draws, receive lab results within 15 minutes and begin patient treatment immediately. This has transformed the healthcare experience for our patients and resulted in significant cost savings for both our patients and the clinic.

### Top Goals:

1. Develop partnerships with health-related organizations for funding, patient services and referral opportunities.
2. Secure \$82K in funding from the Florida Association of Free and Charitable Clinics as part of a \$9 million legislative appropriation.
3. Continue implementation of an aggressive development plan.
4. Recruit additional volunteer medical providers.

## Needs Statement

1. Recruit 5 more volunteer medical providers.
2. Secure \$60,000 in funding to furnish a dental treatment room in our new clinic facility being planned by Charlotte County Government.
3. Secure \$20,000 in funding to purchase a second laboratory to enable us to meet patient/provider demand for needed lab work.
4. Secure \$5,000 in funding annually to purchase miscellaneous needed medical/office supplies.

## Background Statement

The Englewood Community Care Clinic is a 501(c)3 charitable organization that provides free episodic medical services to residents of Englewood and its surrounding communities. Our local economy has been dependent on the construction and service industries and with the severe downturn over the past 4-5 years, hundreds of jobs have been lost and families have found themselves without health insurance. Kaiser Family Foundation research found that across the country, for every 100 people who lose their jobs the number of uninsured grows by 85. This formula suggests that the estimated rate of uninsured adults under the age of 65 in the greater Englewood area could be as high as 35%. This has truly created a health crisis in our community and our clinic, in its first 6 years of existence, has gone a long way in meeting the need to provide quality care to residents who could not otherwise afford it. We opened in January 2011 and serve patients on Monday and Thursday evenings from 5pm to 8pm. Since opening we have helped more than 2,451 patients in 5,977+ patient visits through the generous efforts of volunteer medical providers and nurses. Of the 2,400+ patients seen to date, there have been several cases where our volunteers have literally saved lives. Without health insurance, these residents had delayed getting care for conditions that progressively worsened over time. Our physicians made a difference by quickly diagnosing their conditions, referring them to needed specialists and hospitals, and taking whatever steps needed to get these patients on the path to wellness again. Needless to say, our volunteers find this work incredibly rewarding as they are clearly making a difference in the lives of many in our communities.

## Statement from the Board Chair

About 18 years ago, I began a free clinic through the Christian Health Ministries where I met patients once per month at the Suncoast Worship Center in Englewood. When our local economy started deteriorating in 2007, I experienced an increased demand at my "solo" practice free clinic that I was unable to meet with demands on my career as an emergency room physician and father of 4 children. It was clear we needed to rally support within the healthcare provider community and figure out a way to help the increasing numbers of area residents who were suddenly faced with losing jobs and no longer having health insurance to rely upon for their health care. I gathered a great group of community-minded "doers" and we haven't looked back since. The work is rewarding, the patients are extremely grateful and our community is healthier.

Dr. Raymond James, Board President  
Englewood Community Care Clinic, Inc.

## Statement from the CEO/Executive Director

Several of the physicians who volunteer their time seeing patients at our clinic often comment about the warm and caring environment we have created compared to other free clinics they have been associated with in their past. Our patients are "down on their luck" with low or no-incomes to speak of; yet, our volunteers make them feel welcome. Everyone from our front desk receptionist, the financial eligibility screeners, nurses and physicians put the patients at ease when they arrive. The physicians can really tell that the patients are grateful and that is what makes the experience of volunteering here so rewarding. We are making a difference in the health of these area residents and they appreciate it!

Beth Harrison, Executive Director  
Englewood Community Care Clinic, Inc.

## Areas Served

FL- Charlotte

FL- Sarasota

We are serving patients in Charlotte and Sarasota counties who reside from Sarasota south to Punta Gorda. Since opening in January 2011, the breakdown of patients seen by area of residency is as follows:

- Englewood (Englewood, Cape Haze, Rotonda, Placida, Boca Grande) 78%
- North Port 6%
- Port Charlotte/Punta Gorda 6%
- Venice/Sarasota 6%
- Other 4% (homeless, etc.)

## Service Categories

<b>Primary Organization Type</b>	Health Care
<b>Secondary Organization Type</b>	Human Services
<b>Tertiary Organization Type</b>	Health Care

# PROGRAMS

## Medical Services for the Uninsured and Working Poor

<b>Description</b>	The Englewood Community Care Clinic provides free medical services to the under-served residents of Englewood and surrounding communities. Patients are seen on a walk-in basis on Monday and Thursday evenings, 5pm-8pm, at 6868 San Casa Drive in Englewood. Volunteer physicians and nurses provide medical care. Community volunteers provide administrative assistance.
<b>Budget</b>	\$18,355.00
<b>Category</b>	Health Care, General/Other Patient Care/Health Care Delivery
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Adults Unemployed, Underemployed, Dislocated Poor, Economically Disadvantaged, Indigent
<b>Short Term Success</b>	As the area's unemployment and/or under-employment rates stagnate, the number of patients seen at the clinic each month increases.
<b>Long Term Success</b>	Patients who do not have access to health insurance will no longer delay seeking medical care for fear of the high costs involved. As a result, their episodic medical issues will be resolved at the Englewood Community Care Clinic free of charge and they will be healthy and able to seek employment opportunities to increase quality of life. Another change is that emergency room visits by this population will be minimized as they seek medical attention at the clinic instead of waiting until their condition worsens to the point of being an emergency.
<b>Program Success Monitoring</b>	<ul style="list-style-type: none"><li>• Tracking the number of patients seen at the clinic on a monthly basis.</li><li>• Patient satisfaction surveys</li><li>• Tracking the number of clinic patients making emergency room visits.</li></ul>
<b>Program Success Examples</b>	In the first year of operation, the Englewood Community Care Clinic achieved the following: <ul style="list-style-type: none"><li>• served 685 patients</li><li>• experienced 1, 075 patient visits</li><li>• recruited 16 providers to provide primary care services at the clinic facility</li><li>• recruited 15 physician specialists to provide care to referred patients in their respective offices</li><li>• recruited 25 nurses to care for patients at the clinic facility</li></ul>

## Comments

### **Program Comments by Organization**

In our first 6 years of operating, volunteer providers have identified a real need for low-income area residents to receive dental services. There are no low-cost options available currently so we are seeking funding to furnish a dental treatment room in our new clinic facility currently in the planning stages by Charlotte County Government. We have 4 area dentists who have agreed to volunteer their time to serve patients once the treatment room is operational.

# MANAGEMENT

## CEO/Executive Director

<b>CEO/Executive Director</b>	Beth Harrison
<b>CEO Term Start</b>	Nov 2011
<b>CEO Email</b>	englewoodcareclinic@verizon.net

### Experience

Beth Harrison has 17+ years of nonprofit management experience and serves as part-time Executive Director of the Englewood Community Care Clinic. She is also the full-time Business Administrator of Englewood United Methodist Church. In the past, Beth worked as Vice President for Donor Services and Director of Responsive Grantmaking for Gulf Coast Community Foundation of Venice for almost 10 years. Prior to that, Beth held several management positions with Barnett Bank of Southwest Florida. She has served on the Board of Directors of many nonprofit organizations over the past 26 years and recently served as President of the Venice-Nokomis Rotary Club.

## Senior Staff

Elizabeth Rigney  
Clinical Director

## Staff & Volunteer Statistics

<b>Full Time Staff</b>	0
<b>Part Time Staff</b>	2
<b>Staff Retention Rate %</b>	0
<b>Professional Development</b>	Yes
<b>Contractors</b>	0
<b>Volunteers</b>	70
<b>Management Reports to Board</b>	Yes
<b>CEO/Executive Director Formal Evaluation</b>	No
<b>Senior Management Formal Evaluation</b>	N/A
<b>NonManagement Formal Evaluation</b>	N/A

## Collaborations

The Englewood Community Care Clinic, Inc. has collaborated with Charlotte County Government as it provides space at a lease of \$1/year for us to provide episodic medical services to the uninsured and working poor in our greater community. We are indebted to the Virginia B. Andes Volunteer Community Clinic and the Virginia B. Andes Community Pharmacy for helping us "launch" this new endeavor in the Englewood area and for continuing to assist our patients with specialty care and enrollment in patient assistance programs with various pharmaceutical companies.

## Comments

### Management Comments by Organization

The Englewood Community Care Clinic, Inc. Board of Directors has started something very special to meet the

needs of many in our community who have found themselves without health insurance coverage due to the loss of employment. Since opening our doors in January 2011, we have served more than 2,451 patients with an all-volunteer force of medical providers and nurses. Patients have driven to our clinic from as far as Sarasota and Punta Gorda to get needed medical care! Needless to say, our first 6 years have been extremely successful but with that success comes challenges. The outlook for our community's unemployment rate has improved but not as significantly as hoped. Wages are still low in our service-based economy so the need for continuing the mission of our clinic by serving more uninsured patients will continue to grow. The Affordable Care Act does not seem to have made health insurance affordable for our patients who are working, but at low-wage and often part-time jobs. Our volunteers are some of the most giving and dedicated individuals I've seen; however, we are at a point where full time staffing may be needed to ensure patient case management, volunteer recruitment and marketing/development opportunities are maximized. We are also in need of medical and office supplies throughout the year. Over the next year, our hope is to be able to expand the number of evenings the clinic is open so that more patients can be served. Please feel free to contact me at 941-223-3780 or by e-mail at [englewoodcareclinic@verizon.net](mailto:englewoodcareclinic@verizon.net) for more information. Better yet, stop by the clinic on a Monday or Thursday evening to see us in action!

Your financial investment in the Englewood Community Care Clinic will produce great returns by improving the quality of life (and in some cases actually saving lives) of some of the neediest in our communities. Thank you for taking the time to learn about our great work!

Sincerely,  
Beth Harrison, Executive Director  
Englewood Community Care Clinic, Inc.

# GOVERNANCE

## Board Chair

<b>Board Chair</b>	Raymond A. James DO
<b>Company Affiliation</b>	Emcare Emergency Physicians, Inc.
<b>Board Term</b>	Jan 2017 to Dec 2017
<b>Board Chair Email</b>	rayjamesdo@aol.com

## Board Co-Chair

<b>Board Co-Chair</b>	Joseph S. Chirillo MD
<b>Company Affiliation</b>	Millennium Medical Group
<b>Board Term</b>	Jan 2016 to Dec 2016

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Joseph Chirillo	Millennium Medical Group	
Nita Cole	Market Wise Advertising	Voting
Paula Greenland	Community Volunteer	Voting
Robert Gutierrez DO	Millenium Physician Group	Voting
Beth Harrison	Englewood Community Care Clinic, Executive Director	Exofficio
Joan Hyde	Alliance Oxygen	Voting
Raymond James DO	Gulf Coast Emergency Physicians	
Denise Lanes	Lanes Travel	Voting
Sue McNamara, RN	Doctors Choice Home Healthcare	Voting
Bob Melvin	Gasparilla Properties	Voting
Elizabeth Rigney RN	Englewood Community Hospital	Voting
Alisha Weaver	Keller Williams Real Estate	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	11
<b>Hispanic/Latino</b>	1
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	4
<b>Female</b>	8

**Not Specified** 0

## Governance

<b>Board Term Lengths</b>	2
<b>Board Term Limits</b>	3
<b>Board Orientation</b>	Yes
<b>Number of Full Board Meetings Annually</b>	7
<b>Board Meeting Attendance %</b>	90
<b>Board Self-Evaluation</b>	Yes
<b>Written Board Selection Criteria</b>	No
<b>Percentage of Board Making Monetary Contributions</b>	100
<b>Percentage of Board Making In-Kind Contributions</b>	100
<b>Constituency Includes Client Representation</b>	No

## Standing Committees

Finance

Development / Fund Development / Fund Raising / Grant Writing / Major Gifts

Communications / Promotion / Publicity / Public Relations

Personnel

## Comments

### **Governance Comments by Organization**

What started out six years ago as an idea and a dream for no-cost medical care for the uninsured members of our community, has slowly evolved into a reality that I am so proud to be a part of. As President of the Board of Directors of the Englewood Community Care Clinic, a 501(c)(3), nonprofit medical clinic, I am pleased to share that our community has embraced our efforts and has joined forces with us by contributing, volunteering, and believing in our mission. In our first 6 years, we have seen 2,451+ patients and have had 5,977 patient visits by being open from 5pm to 8pm, Monday and Thursday evenings each week. We can count among our successes that we have helped people get back to work, diagnosed cancer, stabilized blood sugars and blood pressures, and reassured people that they might not be as sick as they feared they were. We hope to expand our services by being available more evenings, we hope to add a pharmacy, and we hope to continue to network with even more health care professionals in our community to continue to provide episodic medical care to those in our community who might not otherwise receive it. Your financial support will make a tremendous difference for all our patients. Thank you.

-Dr. Raymond A. James



# FINANCIALS

## Current Financial Info

<b>Fiscal Year Begins</b>	2017
<b>Fiscal Year Ends</b>	2017
<b>Projected Revenue</b>	\$400,000.00
<b>Projected Expenses</b>	\$360,000.00
<b>Total Projected Revenue includes "in-kind" contributions/ donations</b>	Yes
<b>Endowment Value</b>	\$0.00
<b>Spending Policy Percentage</b>	0
<b>Tax Credits</b>	No

## Capital Campaign

<b>In a Capital Campaign</b>	No
<b>Campaign Goal</b>	0
<b>Anticipate Campaign Within Next 5 Years?</b>	Yes

## IRS Form 990s

990

Form 990

Clinic 990 Filing

Clinic 990 Filing

Clinic 990 Filing

Clinic 990-N Filing

## Audit/Financial Documents

Clinic Audit FY 2015

Clinic Audit FY 2014

Clinic Audit FY 2013

## Solvency

### Short Term Solvency

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Current Ratio: Current Assets/Current Liabilities</b>	284.08	12.26	124.02

### Long Term Solvency

<b>Fiscal Year</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
<b>Long-Term Liabilities/Total Assets</b>	0%	0%	0%

## Historical Financial Review

**Revenue and Expenses**

Fiscal Year	2015	2014	2013
Total Revenue	\$396,218	\$327,709	\$45,079
Total Expenses	\$339,266	\$282,054	\$23,442

**Revenue Sources**

Fiscal Year	2015	2014	2013
Foundation and Corporation Contributions	\$0	\$0	\$0
Government Contributions	\$0	\$0	\$44,599
Federal	\$0	\$0	\$0
State	\$0	\$0	\$0
Local	\$0	\$0	\$0
Unspecified	\$0	\$0	\$44,599
Individual Contributions	\$396,069	\$103,903	\$0
Indirect Public Support	\$0	\$0	\$0
Earned Revenue	\$0	\$0	\$332
Investment Income, Net of Losses	\$149	\$52	\$14
Membership Dues	\$0	\$0	\$0
Special Events	\$0	\$0	\$0
Revenue In-Kind	\$223,050	\$223,600	\$0
Other	\$0	\$154	\$134

**Expense Allocation**

Fiscal Year	2015	2014	2013
Program Expense	\$296,757	\$263,466	\$15,026
Administration Expense	\$34,600	\$18,588	\$8,416
Fundraising Expense	\$7,909	\$0	\$0
Payments to Affiliates	\$0	\$0	\$0
Total Revenue/Total Expenses	1.17	1.16	1.92
Program Expense/Total Expenses	87%	93%	64%
Fundraising Expense/Contributed Revenue	2%	0%	0%

**Assets and Liabilities**

Fiscal Year	2015	2014	2013
Total Assets	\$136,356	\$85,936	\$33,981
Current Assets	\$136,356	\$85,936	\$33,981
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$480	\$7,012	\$274
Total Net Assets	\$135,876	\$78,924	\$33,707

**Top Funding Sources**

Fiscal Year	2015	2014	2013
Top Funding Source & Dollar Amount	Contributions, gifts, grants \$396,069	In-Kind Contributions \$223,600	Government Grants - Unspecified \$44,599
Second Highest Funding Source & Dollar Amount	Investment Income \$149	Contributions, gifts, grants \$103,903	Administrative Fees \$248
Third Highest Funding Source & Dollar Amount	0 \$0	Other \$154	Other \$134

**Comments****Financial Comments by Organization**

The Englewood Community Care Clinic, Inc. received its 501(c)3 determination letter from the IRS in November 2010. We began operating as a free clinic in January 2011. As a result, we e-filed a 990-N since our revenues in 2010 were less than \$5,000. We filed a 990 for 2011, 2012, and 2013. In September 2014, Dowd Whittaker

and Associates, CPAs, PA completed our first audit (for our fiscal year 2013). The same firm completed our 2014 and 2015 audits and has been engaged to conduct our 2016 audit this spring.

Beth Harrison, Executive Director  
Englewood Community Care Clinic, Inc.

**Financial Comments by Foundation**

This organization's gross receipts for 2010 were less than \$25,000 and the organization filed a 990-N for 2010, which does not provide financial information. Financial data for 2011 - 2014 was taken from the organization's Federal 990s. Revenue per the audited financial statements includes the valuation of in-kind contributions.

# PLANS, POLICIES & LICENSES

## Plans

<b>Fundraising Plan</b>	No
<b>Communication Plan</b>	No
<b>Strategic Plan</b>	No
<b>Strategic Plan Adopted</b>	Jan 0
<b>Years Strategic Plan Considers</b>	N/A
<b>Management Succession Plan</b>	No
<b>Continuity of Operations Plan</b>	Yes

## Policies

<b>Organizational Policies and Procedures</b>	No
<b>Written Conflict of Interest Policy</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Directors and Officers Insurance Policy</b>	No
<b>Whistle Blower Policy</b>	Yes
<b>Document Destruction Policy</b>	Yes

## Affiliations

<u>Affiliation</u>	<u>Year</u>
	0

## Awards & Recognition

<u>Award/Recognition</u>	<u>Organization</u>	<u>Year</u>
Non Profit of the Year - Regional Award	Sun Coast Media Group	2016
Non Profit of the Year	Englewood Florida Area Chamber of Commerce	2014
Non Profit of the Year	Englewood Sun Herald	2015

## Government Licenses

**Is your organization licensed by the Government?** No