



## Social Venture Partners Portland Investee Final Report

**Investee: Free Clinic of Southwest Washington**

**Investee Contact: Shirley Gross, Development Director, 360-313-1397**

**SVPP Lead Partner: Ed Mueller**

**Investment Period: Q1 '03 through Q3 '05**

**Annual Operating Budget: \$620K**

### Final Report

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#### **Investee Mission and Vision:**

The Free Clinic of Southwest Washington (FCSW) first began providing medical services to low-income, uninsured residents of SW Washington in 1990. In 2001 the Free Clinic moved into permanent space at the James Parsley Center after completing a successful million dollar capital campaign. The mission of the Free Clinic is to provide free, compassionate, quality medical care to children and adults who are otherwise unable to access health services. Although the clinic primarily serves SW Washington, over 16% of clients typically come from Oregon. No one in need is turned away. The long term goal of the FC is to continue to serve the growing needs of the community. The key limiter to FC growth is availability of volunteers particularly pharmacists and doctors. In Q3 2005 the Free Clinic added a mobile dental clinic and has begun providing basic dental services.

The Clinic is staffed by more than 500 local health-care professionals, including doctors, nurses, pharmacists, technicians, and lay people. Volunteer hours totaled 8,491 in 2004 with a value of over \$214,000 and were 11,182 hrs in 2005 for a value of \$250K. In 2005 the FC served 36,897 patients with a large number of those being referrals to other care providers. The FC served 9,572 children in 2005, a **5.5x** increase since the 2002 base year. This increase includes referrals to other care providers. Not including referrals, we estimate that services to children have grown well over our 2X goal since the 2002 base year.

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#### **SVPP Investment and Objective:**

\$111,400 over three years to improve FC infrastructure and increase the number of children served with basic medical care and other services. Services include: sports physicals, vision care, exams, immunizations, head lice programs, medications, and basic care for low income or uninsured children (and adults) plus periodic dental care. Patients served also include telephone referrals to other providers (that eventually result in medical services being provided).

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#### **Investment Accomplishments**

**Accomplishments:** Progress made despite ED changeover (3 ED's during investment)

- The number of children served grew from 1746 in 2002 to 9572 in 2005, a 5.5x increase versus an original goal of doubling. Without referrals we estimate well over a 2X increase.
  - SVPP has played a role in mentoring past ED's as well as guiding the set-up of Board committees to improve board governance.
  - SVPP served on the hiring committee to hire a new ED in Oct 2004.
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- Worked with board members and staff to complete a strategic plan in 2004 that was ratified by the board.
- Worked with FC staff to develop marketing plan content and wrote a letter to solicit funds for communication (Newsletters, Annual Report...).
- Completed an Excel growth model to enable staff to model cost of increased patient load and effect of adding additional clinics.
- Helped with the publications of one annual and several quarterly reports by soliciting funds.
- Support FC Web Site revamp by developing an organization and content document. FC then obtained a pro bono contractor to update site.
- Provided needed office furniture from the old SVPP office (refrigerator, microwave, cabinets and other items).

### Volunteers who helped make SVPP's investment successful over the investment period:

George Alexander (ED mentoring and Board Governance improvement), Sara Allan (Clinic Financial Growth Model and Rev 0 Strategic Plan), Howard Shapiro (Marketing Plan inputs and Request for Financial Support letter, Newsletter improvement), Ed Mueller (Team Lead), Mike & Chrissy Maerz (volunteers & in-kind gifts of supplies), Alex Zatarain (volunteer), Valerie Ilsley (volunteer), Sharon & Joe Barthmaier (volunteers), Ralph and Megan Leftwich (volunteers), & Jean Hart (office furniture/refrigerator from first SVPP office).

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### Investment Impact\*:

Category	Total
SVPP Direct Financial Investments (Grants)	\$111,400
Donations from partners, friends, and businesses solicited by SVPP	\$8050
Value of volunteer hours from partners and friends	\$22000
Operational impact from SVPP-supported Projects/Initiatives	
<b>Total</b>	<b>\$141450</b>

\* Direct Investment is the actual cash transferred to the investee. Total Impact also includes donations from partners and friends, the value of volunteer hours, and the operational impact (e.g. cost savings, new capabilities) from SVPP projects. The value of volunteer hours is calculated using from \$10/hour to \$120/hour depending on the type of work performed.

### Comments:

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### Investee Feedback

#### Input from Shirley Gross, development director

- " We were pleased with support and leadership given for development of a strategic plan"
- "We definitely valued the consistent volunteer support & the relationships that developed."



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- "The Staff appreciated the help with communication and marketing plans plus the focus on newsletter organization and use of themes."
- On the down-side: not much progress first year due to initial lead partner not having enough time to help.

### **Summary:**

This investment has enabled SVPP to help with a major problem in the country: lack of health insurance and the inability of many to afford good health care. All those who volunteered at the FC saw the acute need and the extreme gratitude of those who were helped.

The FC staff was able to develop a strategic plan for the first time and, with the board, identify cost and growth challenges as well as prioritizing opportunities and key tasks. In the end the FC did not add extra clinics mostly due to the difficulty in getting skilled volunteers. The key limiter has been pharmacists who are getting squeezed in their day jobs by extended hours and duties.

Over our three year engagement we have been gratified by the interaction and open working relationship, pleased that we have been able to help the FC with its mission and impressed by the quality and dedication of the management team. We certainly see the need in the community and are proud to have helped the Free Clinic to serve those in need of medical care in the area.