

**Board of Directors Meeting
February 23, 2026 | 5:00 PM**

Members Present	Members Absent	Staff Members Present
Becca Bruhl, DrPH, MPH, MEM Rashid Jones, MBA Melissa Tucker, CPA David Aday, PhD R. Scott Herr Ron Kirkland Terry Moran Robin Nelhuebel, PhD, MSN, RN, RT(R) Karen Stokes, MSN-RN Randy Walton, PHD Barbara Null - JCC Ayanna Williams - COW	Cris Becerra Cornelius Powell, MD, MBA, CHCQM-PSRM Henry Ranger, PharmD Doug Holroyd - York	Aaron Thompson Kendra Robinson, NP Lorenzo Modeste, DDS Susan Dunn Gary Preston

1. Call to Order & Attendance | Dr. Rebecca Bruhl, Board Chair

2. Consent Agenda | Dr. Rebecca Bruhl, Board Chair
 - a. Board of Directors Minutes | January 26, 2026
 - b. Governance & Nominating | February 4, 2026
 - i. A motion was made to approve the consent agenda by Dr. David Aday and seconded by Karen Stokes; the motion carried.

3. State of the Facility Reports | Mr. Aaron Thompson
 - a. Facility Update | Aaron Thompson
 - i. Mission Moment shared by Kendra Robinson, NP
 - ii. Metrics data shared.
 - iii. Update on "Give Kids A Smile."
 - iv. Doug Holroyd remains the Jurisdictional Representative for York County.
 - v. Introduced Alissha Gilbert as a new MA.
 - vi. Layer 9 completed the equipment installation.
 - vii. The 990 is complete and has been sent for review & approval by the Finance Committee.
 - viii. Anticipating a grant check from TowneBank for a technology initiative.
 - ix. Drafting the budget for FY'27 is in progress.
 - x. WHF grant progress report has been submitted.

- b. Clinical Update | Kendra Robinson, NP
- c. Business Office | Jacob Cooper
- d. Operations | Maggie Beamon
- e. Dental |Dr. Modeste
- f. Marketing & Communications
- g. Communication & Development | Susan Dunn
- h. Grants & Development | Sara Lewis

4. Committee Reports

- a. Finance Committee | Ms. Melissa Tucker, CPA, Chair
 - i. No questions or additions aside from the information in the board packet.
- b. Governance & Nominating | Dr. David Aday, Chair
 - i. The patient advisory committee will soon progress.
- c. Planning & Performance | Mr. Scott Herr, Chair
 - i. The current document will be shared with Committee Chairs.
- d. Communications & Development | Terry Moran
 - i. Current focus is on the Golf Tournament.
 - 1. Tournament information for sponsors and players is open for submissions/registrations.
 - 2. The Residents' Campaign information is complete.
 - 3. The silent auction through GalaBid is in progress.

5. Discussion: Board Self-Evaluation | Dr. Becca Bruhl

- a. Meeting Structure Discussion
 - 1. Possible changes discussed
 - a. Utilization of a dashboard
 - b. Written committee and staff reports as a part of the board packet to become a part of the consent agenda to reduce time on verbal reports.
 - c. Possibly have the Executive Director indicate priority items to be discussed at board meetings.
 - d. Set aside time for actionable items at board meetings (Executive Directors' priority items).

6. Education: FQHCs, FQHC Look-Alike, RHCs | Dr. Becca Bruhl

a. Due to time constraints, the presentation will be emailed to the board.

7. Next Meeting | March 23, 2026

8. Adjourn: A motion was made by Dr. David Aday to adjourn the meeting and seconded by Terry Moran, and the motion carried.

**Executive Committee Meeting
March 11, 2026 | 5:00 PM**

Members Present	Members Absent	Staff Members Present
Dr. Becca Bruhl, Chair Rashid Jones, Vice Chair Dr. David Aday Scott Herr Terry Moran Melissa Tucker, CPA		Aaron Thompson Susan Dunn

1. Call to Order & Attendance
2. Approval of Minutes | January 12, 2026
 - a. Minutes were approved at the February 23, 2026 Board of Directors meeting.
3. Updates | Aaron Thompson
 - a. The FY'27 budget process is in progress.
 - b. Layer 9 is in its final stages of updating and installing new equipment.
 - c. GKAS was a success, and we saw 132 children.
 - d. OTMDC hosted a Community Health Fair.
 - e. The 3rd annual Community Baby Shower will take place on April 15, 2026.
4. Review & Discussion
 - a. Space & Building
 - i. Recent Article (Williamsburg Watch)
 1. Will be included in the March board packet.
 - b. FQHC and Look-Alike Discussion
 1. The committee would like to discuss and get input from the board at the March meeting.
 2. Discussed the various metrics that would need to be met to become a LAL or FQHC.
 - ii. CBH Update (York Presentation)
 1. CBH recently did a presentation to York County, their fiscal agent.
5. Board Succession & Planning | Dr. D. Aday
 - a. 3 standards the committee and board need to address.
 - i. 51% of patients on board.

- ii. Patient board representation should match our patient demographics.
- iii. Non-patient members are representative of the general community.

6. Next Meeting | May 13, 2026 at 5:00 PM

7. Adjournment

- a. A motion was made to adjourn by Melissa Tucker and seconded by Terry Moran, and the motion carried.

**Finance Committee Meeting
 March 9, 2026 | 4:30PM**

Members Present	Members Absent	Staff Members Present
Melissa Tucker, Chair Becca Bruhl Scott Herr, Chair Doug Holroyd Heather Modispaw	Rashid Jones Larry Snyder	Aaron Thompson Susan Dunn Jacob Cooper Gary Preston

1. Call to Order & Attendance
2. Approval of Minutes | January 12, 2026
 - a. Minutes were approved at the February 23, 2026 Board of Directors meeting.
3. Review and discussion of financial Reports for February 2026.
4. 990 Review
 - a. Reviewed, discussed and proposed to share with the board to sign.
 - b. A motion was made to present the 990 to board by Doug Harold and was seconded by Scott Herr and the motion passed committee.
5. Executive Director Updates:
 - a. The fiscal year 27 budget process will begin in the next few days.
 - b. Layer 9 is in its final stages of updating and installing new equipment.
 - c. GKAS was a success and we saw 132 children.
 - d. OTMDC hosted a Community Health Fair in February with good turnout.
 - e. The 3rd annual Community Baby Shower will take place April 15, 2026.
 - f. The applicant process for the Marketing & Communications job opening is underway.
6. Next Meeting | May 13, 2026 at 4:30pm.
7. Adjournment
 - a. A motion to adjourn was made by Scott Herr and was seconded by Doug Holroyd and the motion passed committee.

**Communication & Development Committee Meeting
 March 12, 2026 | 2:00PM**

Members Present	Members Absent	Staff Members Present
Terry Moran, Chair Ron Kirkland Rashid Jones Karen Stokes		Susan Dunn Sara Lewis Aaron Thompson

1. Call to Order & Attendance
2. Approval of Minutes | January 8, 2026
 - a. The minutes were approved at the January 26, 2026 Board of Directors meeting.
3. Updates
 - a. Currently a large portion of our focus has been working on the FCMGA Tournament Charity Classic.
 - i. Reviewed the basics of the tournament and where the funds come from.
 - ii. Discussed how to make the public aware of the auction via Chamber and other avenues.
 - b. Ron Kirkland announced that for each WHMA membership 50% will be given to OTMDC.
 - c. Ron Kirkland announced that WHMA pledges to be SFW's main sponsor for the 2026 race.
 - d. Karen Stokes announced that Ford's Colony Health Fair, May 2, 2026, would like OTMDC to have a table. At this event OTMDC would focus more on donorships.
 - e. Sara Lewis discussed updates on grants.
4. Next Meeting | May 14, 2026
5. Adjournment

**Planning & Performance Committee Meeting
February 18, 2026 | 5:00PM**

Members Present	Members Absent	Staff Members Present
Scott Herr, Chair Henry Ranger Karen Stokes	Robin Nelhuebel	Aaron Thompson Susan Dunn

1. Call to Order & Attendance
2. Approval of Minutes | December 17, 2026
 - a. Minutes were approved at the January 26, 2026 Board of Directors meeting.
3. Continued review of the strategic plan points and metrics.
 - a. Quality
 - i. Enhancing ability to share EHR
 1. The partnership with Sentara to obtain EPIC may not come to fruition, but one more avenue is being looked into.
 2. Staff is looking into upgrading Allscripts for our needs.
 - ii. Tracking benchmark to other partners
 1. We currently have a dashboard with metrics. This is shared quarterly with the board.
 2. Previously shared with other safety net providers at the CCC, but that committee is changing direction.
 3. National benchmarks, such as the HRSA Quality and Metrics are done within the clinical side.
 - iii. Chronic Disease Management
 1. One chronic disease is tracked within the clinic.
 2. Discussed expanding to 3 chronic diseases.
 3. Cohorts would need to be utilized due to the transient nature of our patient population.
 - b. Growth
 - i. Improve community awareness
 1. Social Media Reach
 - a. Due to the cybersecurity issue we had to start a new Instagram page so that data is lacking.
 - b. Facebook metrics are stagnant.
 - c. LinkedIn does well.
 - d. Discussion on the usefulness of social media in capturing new followers. It gets the most traffic when there is a holiday or inclement weather.

2. Newsletter
 - a. It was suggested to have an emailed newsletter sent out to patients.
 - b. Current donor newsletter metrics are in progress.
- ii. Community Partnerships
 1. Outreach events have been steady and every opportunity to participate is looked into.
 2. Patient reported referrals
 - a. This is not being measured, but we will be using Follow My Health to begin tracking this in the near future.
 3. Growing Community Partnerships
 - a. Apply a partnership strategy
 - i. Staff continues to work with other area organizations.
 - ii. Some new partnerships to look into that focus on mental health are: Abundant Life, Mindful Wellness, Genesis, The Pavilion.
 4. Partner employers
 - a. Staff continues to work with other area organizations.
 5. Expanding Mental Health Resources
 - a. Continuing to look into adding resources, see above.

4. Next Meeting | April 15, 2026 at 5:00PM

5. Adjournment

February Metrics – OTMDC

Total Patients	840	936	▲	96	11%
Total Visits	1,106	1,299	▲	193	17%
Visits per patient	1.32	1.39	▲	0.07	5%

NUMBER OF CLIENTS SERVED

Category	February 2025	February 2026	Ratio
Total Dental Visits	372	413	31.8%
Total Medical Visits	734	886	68.2%
Total Visits	1,106	1,299	

GENDER

Gender	February 2025	February 2026	Ratio
Male	372	498	38.3%
Female	734	801	61.7%
	1,106	1,299	

AGE

Age Groups	February 2025	February 2026	Ratio
0-11 Months	2	35	2.7%
1-11 Years	112	57	4.4%
12-18 Years	63	132	10.2%
19-35 Years	231	257	19.8%
36-64 Years	565	659	50.7%
65+ Years	134	159	12.2%
	1,107	1,299	

RACE

Race	February 2025	February 2026	Ratio
Asian	41	47	3.6%
Black	201	247	19.0%
Hispanic	396	469	36.1%
White	207	286	22.0%
Other	262	250	19.2%
	1,107	1,299	

HEALTH INSURANCE

Insurance Category	February 2025	February 2026	Ratio
Uninsured	578	797	60.9%
Medicaid/MCO's	258	243	18.6%
Medicaid Dental	102	96	7.3%
Medicare	33	29	2.2%
Dual Eligible Medicare	13	18	1.4%
Commercial Ins.			
Anthem/Optima/CIGNA	102	88	6.7%
VA Benefits	1		0.0%
Healthcare Exchange	1		0.0%
Other	18	37	2.8%
	1,106	1,308	

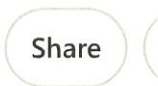
LOCALITY				
Location	February 2025	February 2026	Ratio	Cumulative %
James City County	627	724	55.7%	55.7%
City of Williamsburg	165	210	16.2%	71.9%
York County	123	132	10.2%	82.1%
Charles City	2	3	0.2%	82.3%
Gloucester	15	17	1.3%	83.6%
King Queen	8	6	0.5%	84.1%
New Kent	12	18	1.4%	85.5%
Newport News	91	109	8.4%	93.8%
Hampton	8	13	1.0%	94.8%
King William	25	29	2.2%	97.1%
Richmond	-	1	0.1%	97.2%
Surry	9	8	0.6%	97.8%
Other	21	29	2.2%	100.0%
	1,106	1,299		

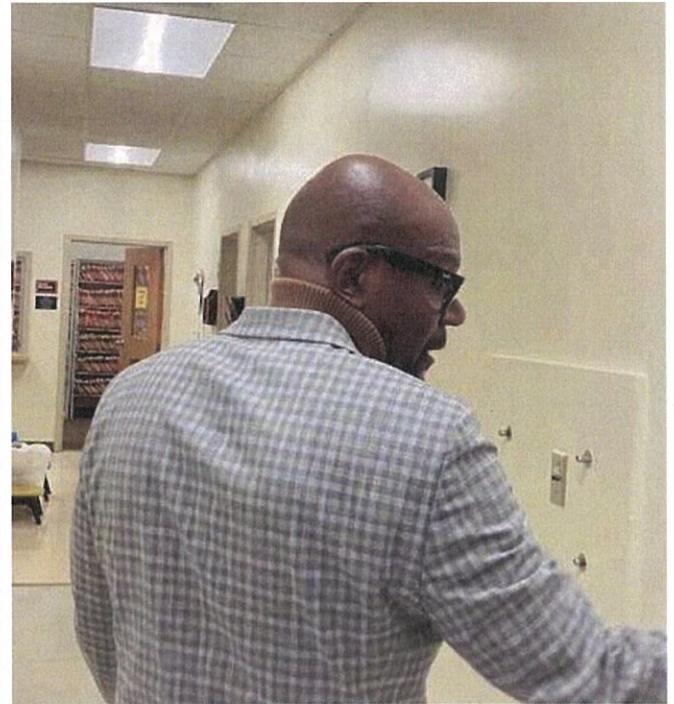
Health center studies options if JCC sells its building

It's March 9. Olde Towne Medical & Health Center may have to move or buy the building where it serves 5,000 uninsured and underinsured area residents. Williamsburg police murder arrest.



WILLIAMSBURG WATCH
MAR 09, 2026 · PAID





Clockwise, from top left: Olde Towne location at social services building; lab technician at work, dental patient examination, Executive Director Aaron Thompson (Williamsburg Watch photos)

James City County is considering selling the building Olde Towne Medical & Dental Center has used to provide care to uninsured area residents since 1993, creating uncertainty for the future of the nonprofit group.

The Center has 11,000 feet of space in a building it shares with James City County Social Services department. But the county is looking to sell the building when it opens its new county government center and moves social services there in two years.

“It would be difficult to find another space...that would work for Old Towne...at a price that Old Towne would be able to afford,” we were told by Rebecca Bruhl, who is chair of Olde Towne’s board of directors.

Several years before her appointment, the county had considered taking up all the space in the 29,000 square-foot building to house Social Services. Olde Towne formed a working group to look for alternative sites, Bruhl said, but was unable to find suitable space in the right price range.

She said the board has now convened another working group to determine if Olde Towne could afford to buy its current building, which sits on 5.5 acres and assessed at \$2.98 million.

“In an ideal world, Old Towne would want to purchase the property,” Bruehl said. “But we have some work to do to determine what the terms of that would look like, and how Olde Towne would raise money (for it). (We’ve) been in that space for a long time and would very much like to stay in that space. “

The nonprofit serves about 5,000 people in the greater Williamsburg area and nearby communities, handling between 14,000 – 15,000 visits each year, Executive Director Aaron Thompson told us. He said more than half of patients come from James City County, 10-15% each from Williamsburg and York County and nearly 9% come from outlying areas, from Surry and New Kent counties to Newport News.

While the center accepts any patient, its sweet spot is taking care of patients who have no insurance or are on Medicaid.

Its services offer a cost-effective alternative to uninsured patients who would otherwise go to the emergency rooms at the Sentara and Riverside hospitals to get routine care, Thompson said.

Patients without insurance are charged on a sliding scale based on their ability to pay. The center provides a full range of primary care, including obstetrics, as well as dental care.

Thompson said Olde Towne gets support from Historic Triangle communities, but would need to embark on a capital raising campaign if it decides to purchase its current location.

Aaron Thompson

From: Williamsburg Watch <williamsburgwatch@substack.com>
Sent: Tuesday, March 17, 2026 4:31 AM
To: Aaron Thompson
Subject: \$14.4 million sought to expand mental health center into primary medical and dental care

[View in browser](#)



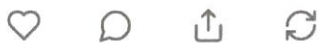
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Link to us at www.williamsburgwatch.com

\$14.4 million sought to expand mental health center into primary medical and dental care

Happy St. Patty's Day March 17. Colonial Behavioral Health wants to expand into medical and dental care; some argue it's duplication. Electricity hikes shock consumers.

WILLIAMSBURG WATCH
MAR 17 · PAID



READ IN APP 



Construction progresses on Center for Supported Wellness (Williamsburg Watch photo)

The agency responsible for mental health services in our area would like to expand into a full-service provider, offering primary and dental health services to lower income patients.

Colonial Behavioral Health is seeking \$14.4 million from local governments to put its expansion plans in place, said Executive Director David Coe.

James City County is being asked to fund nearly half of the total capital building request-- \$6.7 million -- with \$5.5 million from York County, \$1.2 million from Williamsburg and just under \$1 million from the city of Poquoson, Coe told us. The four localities are being asked for another \$4.4 million for operating funds.

The agency celebrated 55 years providing mental health and drug addiction services to the Historic Triangle in January.

It is building a state-funded crisis response center on former Eastern State property in James City County, now formally named the Center for Supported Wellness. The center would provide walk-in services for people who need help for a mental or drug abuse crisis, evaluate people brought in by police to have their mental state assessed, and offer a crisis stabilization program to provide stays of up to 10 days for patients with more intensive health care problems.

Coe has plans for three additional buildings, one next door to the crisis center and two across the street, which would include space for primary health care and dental health care.

The behavioral health group would bring in a partner, Southeastern Virginia Health Services, to handle the primary and dental health care cases, Coe said.

“None of the localities have committed to us yet” on funding for the expansion, Coe said, adding “we’ve never made a capital request before” to pay for building construction.

The agency’s plans raised some alarms from supporters of Olde Towne Medical & Dental Center, which has been providing free and low-cost health services to area residents since 1993.

“Why do we need (another provider) when we already have Olde Towne and we have Lackey (clinic)?” said York County Chair Douglas R. Holroyd, who is also on the board of Olde Towne. Olde Towne receives funding from Williamsburg, James City and York counties and has a representative from each locality on its board.

“This will be a different model, but in some ways it may look like some of the services that Lackey or Old Towne provide,” said Coe.

We reached out to Lackey Clinic but did not hear back.

Colonial Behavioral Health and Olde Towne had discussed co-locating a facility to provide joint services years ago, we were told by former Olde

Towne board member Jonathan Weiss, who is retired from his post as director of mental health and substance abuse at CBH.

Weiss said the discussions fell apart because of Olde Towne's concerns about having its group, a nonprofit private organization, as part of a state-funded organization.

The Williamsburg Health Foundation, which provides money to both organizations and other nonprofits, has studied health needs in the area and believes there is still a lot of need for more medical providers, Executive Director Deanna Van Hersh told us.

The founder of Olde Towne, Judy Knudson, agrees.

"All you have to do is go to the emergency room sometime" to see how many uninsured patients seek primary medical care, said Knudson, who retired in 2010. "There are so many people who need help."

Share

Electric bills shock consumers

The Greater Williamsburg Community Health Alliance

Monthly Meeting

March 19, 2026

1:00 pm - 3:00 pm

Truist Building in New Town
4801 Courthouse Street, Suite 201
Jeanne Zeidler Meeting Room
Williamsburg, VA 23188

Agenda

Objectives:

- *Formalize plans for Dental Outreach Event*
- *Discuss feasibility of NAP Credit standardization and incentivizing volunteers*
- *Discuss updates on GWCHA 2026 Goals*

1. **Welcome** - All

2. **Dental Outreach Event Planning and Discussion** - All

- Venue - Riverwalk
- Date - April 30, 2026
- Expenses
- Sponsorship
- Invite List - Clinic Staff/Volunteers, Dental Affinity Groups, etc.
- Invitation
- Event Programming
- Other

3. **NAP Credit Discussion** - All

4. **Updates:** Dental Medication Access, Shared Dentist, Remote Hygiene, Other

5. **Closing** - Tracey



COMMONWEALTH OF VIRGINIA
STATE CORPORATION COMMISSION

Office of the Clerk

February 26, 2026

Aaron Thompson
5249 Olde Towne Road
Williamsburg, VA, 23188

RECEIPT

RE: WILLIAMSBURG AREA MEDICAL ASSISTANCE
CORPORATION
Entity ID: 04054854
WORK ORDER NO: 202602267096804

Dear Customer:

This is your receipt for \$25.00 for payment of an annual registration fee and/or penalty that was assessed and/or due for the entity referenced above. The due date for the next annual registration fee is February 28, 2027.

All annual registration fees that have been paid are non-refundable and non-transferable.

If you have any questions, please call (804) 371-9733 or toll-free 1-866-722-2551.

Sincerely,

Bernard J. Logan
Clerk of the Commission

Delivery Method: Email

State Corporation Commission Clark's Information System

Hi, Aaron Thompson



- Dashboard
- Online Services
- Pay Registration Fees
- CIS Help
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- Nonresident Property Owner Search
- UCC Search
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- Profile

CONFIRMATION



Submission Successful

Payment Confirmation Number: 216434539

Document Type	Entity Name	Submitted/Filed Date/Time	Fee	Status
Registration Fee	WILLIAMSBURG AREA MEDICAL ASSISTANCE CORPORATION	02/26/2026 11:58 AM	\$25.00	Approved

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Care Alliance Collective Clinic Partnership Agreement

This Partnership Agreement (“Agreement”) is entered into by and between:

Care Alliance Collective LLC
1320 Richmond Rd #1144
Williamsburg, VA 23185
(Hereafter referred to as “CAC” or “Company”)

and

Olde Towne Medical & Dental Center
5249 Olde Towne Road
Williamsburg, VA 23188
(Hereafter referred to as “Clinic”)

CAC and Clinic may collectively be referred to as the “Parties.”

The purpose of this Agreement is to establish a collaborative partnership for behavioral health care coordination, referral management, and support services designed to improve access to behavioral health services for patients of the Clinic.

1. Services Provided

Care Alliance Collective will provide care coordination and referral management services designed to improve behavioral health access and continuity of care.

Services may include:

- Behavioral health screening support to guide referral decisions
- Care coordination and referral management
- Warm handoff coordination between Clinic and behavioral health providers
- Identification of barriers to care such as transportation or scheduling
- Transportation coordination for eligible clients when appropriate
- Access to CAC’s vetted behavioral health provider network
- Follow-up communication to improve referral engagement
- Periodic workflow collaboration with Clinic staff

CAC operates as a care coordination and referral support organization and does not provide clinical treatment services under this agreement unless separately contracted.

Signatures

Olde Towne Medical & Dental Center

Name: Aaron Thompson

Title: Aaron Thompson

Signature: *Aaron Thompson*

Date: 03/16/2026

Care Alliance Collective LLC

Name: Kiara Robinson

Title: CEO, Care Alliance Collective LLC

Signature: *Kiara Robinson*

Date: 03/06/2026



The
Pavilion



Mental Health *with Heart*

At The Pavilion, we are committed to caring for adults living with mental illness by providing psychiatric stabilization at our state-of-the-art facility in the Hampton Roads area of Virginia. We are committed to facilitating change through our inpatient facility, which utilizes a multidisciplinary team approach, inclusive of the patients.

We aim to increase awareness, collaborate, and advocate for issues related to mental health across our region. Our goal is to deliver exceptional therapeutic experiences and outcomes through a culture of excellence in our secure environment.

The Pavilion is a 98-bed, 49,000-square-foot inpatient psychiatric facility that offers services based on the principles of milieu therapy. Our program provides a safe, supportive, and secure environment for individuals to return to a stable level of functioning and live life to the fullest. Treatment is designed to immediately stabilize acute psychiatric conditions such as schizophrenia, major depressive disorder, bipolar disorder, panic/anxiety disorders, and other psychiatric conditions.



Phone 757-797-1888 | Fax 757-941-6419
5483 Mooretown Road, Williamsburg, VA 23188
PavilionWP.com



Emergency Help

211

Non-Emergencies

*Food
Housing
Utility Assistance
Healthcare Services
Transportation
Legal Services
Counseling*

988

Suicide and Crisis

*Thoughts of Suicide
Mental Health Crisis
Substance Use Crisis
Emotional Distress
Veterans Crisis*

911

Emergencies

*Medical
Fire
Crime
Abduction
Domestic Violence
Impaired Driving
Suspicious Activities*



The
Pavilion



(757) 797.1888



5483 Mooretown Road
Williamsburg, VA 23188



PavilionWP.com

The Pavilion is a 98-bed, 49,000-square-foot inpatient psychiatric facility that offers services based on the principles of milieu therapy. These provide a safe, supportive and secure environment for individuals to return to a stable level of functioning and live life to the fullest.

Our program is designed to immediately stabilize acute psychiatric conditions such as schizophrenia, major depressive disorder, bipolar disorder, panic/anxiety disorders, and other psychiatric conditions.





The
Pavilion

NOW OFFERING
Outpatient

Behavioral Health Services



Partial Hospitalization Program (PHP)
Intensive Outpatient Program (IOP)

The Care Package

We provide a comprehensive and integrative treatment approach for adults including group therapies, individual counseling, psychoeducation, medication management, and psychiatric care. We educate individuals on their condition and how to effectively manage it.

Our Programs Include:

Partial Hospitalization Program - PHP

5 days per week, Monday - Friday

Person-centered care, evidence-based approach, lunch provided.

Intensive Outpatient Program - IOP

3 days per week, Monday, Wednesday, and Friday,
9am-12pm



Questions? Call (757) 941-6410

PavilionWP.com

303 Butler Farm Road, Suite 102, Hampton, VA 23666

— YOU'RE WELCOME TO —


Network & Conversation
Behavioral Health

NETWORKING EVENT



— 20 March 2026 —

— 10:00 AM - 12:00 PM —

 **Bazaaro's Deli**

📍 5715 RICHMOND RD, SUITE 63A,
WILLIAMSBURG, VA 23188



Clinical Department Update

Submitted By: Kendra Robinson, FNP 03/12/2026

Mission Moment: Flu season is not over! In the last two weeks OTMDC has seen 5 sick children (all middle school age) positive with Influenza B. We were able to see all of the children as walk ins via our open Access clinic and provided masks and supportive care to the parents and siblings of each child. Quick intervention prevented one of the children who suffers with asthma from having to make an ER visit. We were able to see the child, diagnose the influenza and provide respiratory treatments in the office and prescriptions and nebulizer equipment to control asthma symptoms at home during the illness.

Volunteer Specialty Care

- February 2026 the following specialties provided 31 visits.

Cardiology: 5 visits	Chiropractor: 1 visit
Gastroenterology: 3 visits	GYN: 9 visits
Nephrology: 3 visits	Ophthalmology: 8 visits

Clinic staff Update:

- The provider who works Open Access is currently out on personal leave. Other providers are covering walk in patients during her absence. Open access remains available daily for patients needing same day appointments.

Community Involvement:

- Gloucester Matthews Care Clinic (GMCC) and OTMDC collaboration for eye care update:
 - 2/2026:
 - 1 GMCC patient was scheduled and came in for their diabetic eye exam at OTMDC.
- Williamsburg House of Mercy:
 - Clinic date 3/12/26, no patients were seen. Most likely due to the snow that afternoon.
 - Next clinic date at WHOM is set for April 9th.

March 2026 Departmental Update

Business Office

- Both the Medicaid and Medicare Cost Reports for FY25 have been submitted. We are awaiting final settlement confirmation from Myers and Stauffer for the Medicaid Report and Novitas for the Medicare Report.
- Layer 9 completed our permanent equipment install with no issues to date.
- Jacob continues to work in communication with Layer 9 and Veradigm as we navigate the Allscripts upgrade project. This includes steps to reincorporate Veradigm/Allscripts' Follow My Health portal. Follow My Health will give Olde Towne more robust communication tools to reach our patients more effectively, and provide much needed client/patient satisfaction surveys and metrics.
- Jacob is working with Maggie in Operations to adjust the dental schedule over the next quarter to make up the approximately 2% of revenues in Medicaid Dental to bring us in line with the budget (we're currently at 64% though February's reports don't show a couple payments that arrived late in the month/early March).
- When viewing the financials for February, make note that Commercial and Dual Eligible insurances are essentially all commercial (we were combining them when the budgets were created). With that in mind, combining Commercial and Dual Eligible's YTD revenue along with their respective budgets shows \$66,892 of \$108,000 (61%) so far, this fiscal.
- Our Occupational Medicine program with JCC is right on budget as we near the fourth quarter with an uptick likely to be seen in March as NP Robinson performed some Occ Med services offsite in addition to those being seen by NP Christian onsite. Chris Rivera, Clinical Professional, remains an integral part of the program.
- Both Medical and Dental exceeded their monthly averages in patients and visits for February.

Date: 03/13/2026

By: Margaret "Maggie" Beamon

Medication Access Program

- For the month of February, MAP requested 305 medications on behalf of 120 patients which were valued at \$327,354.29.
- I applied and was approved for a scholarship to attend Informa Connect's PAP: Patient Assistant and Access Programs annual conference from 03/17/2026-03/19/2026. This year I will be attending virtually and I hope to attend in-person within the upcoming years.
- I am scheduled to attend monthly TPC Technical Assistance Call via Zoom on 03/12/2026.
- This past month, I began training Zulma (one of our clinical assistants) on how to assist with Medicaid applications. She completed the Medicaid training on 02/26/2026 offered by Sign Up Now.
- Patient Story: One of the applications Zulma first completed with limited supervision was for a young family of 4. The mother is now pregnant and had never applied for her family. We advised that we can apply for the whole family with one application if she would like. Thankfully, the entire family was approved for full coverage Medicaid and insurance coverage is no longer a worry for this family.

Operations Manager

- I met with the clinical assistants individually on 03/10/2026 & 03/11/2026.
- Continue to monitor dental schedule and adjust as needed.
- Drafted 2 documents for dental and submitted for review
 - Dental Scope of Practice Policy
 - Dental Informed Refusal Form



To assure access to quality health and wellness care to the residents and workforce of the greater Williamsburg community.

Dental Update | March 2026

We can finally see the buds on the trees and spring has sprung! Olde Towne Dental Clinic continues to spring into action with continued community service. We recently completed our annual Give Kids A Smile event last month and now so many of the children have returned for follow up treatment. We recently had another young patient from Central America that needed more than half of her teeth removed due to extensive rampant decay. The parent was so appreciative of all our efforts, especially knowing that if she went to a private Pedodontist, she would not be able to afford the treatment. Of course, our clinic is limited in total dental child care, but she was very cooperative with her dental treatment! Once we complete the extractions and restorations, we will monitor the progress of her permanent teeth.

For the month of February, the clinic treated 368 patients (avg: 272) and dental visits were 413 patients (avg:316). So, we were extremely busy during the month of February. Pre authorizations for crowns, denture and partials continue to be reviewed by the business office and directed for patient appointments. Olde Town Dental Clinic looks forward to our continuing successes.



To assure access to quality health and wellness care to the residents and workforce of the greater Williamsburg community.

Communication & Development | Susan Dunn March 2026

Development

- Events
 - FC MGA Charity Tournament and Residents Campaign
 - Worked with Barry Golliday to get the Residents Campaign letters complete and sent to the printers.
 - This material will be delivered early March and the FCMGA will be stuffing and delivering the information to all households in the Ford's Colony community.
 - Attended the first committee meeting as Michelle's replacement at the end of February.
 - Continuing to work on donation and sponsor tracking, and administrative tasks to help with the event.
 - Community Health Fair
 - The health fair was hosted by OTMDC and we had a table there. We were able to speak to several attendees and give them information on our services. Thank you to Karen Stokes for helping out.
 - Upcoming Events
 - 4/15/26 from 11:30-2:30 OTMDC will host Birth in Color's annual Community Baby Shower, flier included.
 - 4/16/26 Panda Express Virtual Fundraiser. For Online orders only use code 9008283 in the fundraiser code box at check out and 28% of your order total will come to OTMDC! Flier included.
 - 4.27.26 is the Kiwanis 7th Annual Purpose Driven Golf Tournament. Spread the word, the more players and sponsors the larger the grant Kiwanis Club of Williamsburg will be able to bestow on OTMDC. Flier included.

Communications

- Website
 - Updated our Candid profile to maintain our 2026 Platinum Transparency status.
- Misc
 - Emailed human resources at CWF to offer information, attend Human Resource events, or do a presentation about OTMDC to their employees.
 - Beginning to work on scheduling Board and Committee meetings for the next fiscal, be on the lookout for invites.
 - Attached is a flier that explains the "Donate Your Birthday" campaign. Basically you set up a fundraiser on your social media asking for donations to your cause in lieu of traditional gifts. It would be great if we could get as much board participation as possible. This has also been shared with staff.

Community Baby Shower

Wednesday,
April 15, 2026

11:30 AM to
2:30 PM

Olde Towne Medical and
Dental Center

5249 Olde Towne Rd,
Williamsburg, VA 23188

This event will provide information on pregnancy health & wellness, doula support, car safety, postpartum self-care, and community resources.

We've made it easy to register! Scan the QR code to visit our registration page. **Expectant mothers must register & attend sessions to receive the gift bag.**

Donations for this event are welcome at <https://birthincolor.org/donate> **and note: Williamsburg Baby Shower 2026.**

For more information call:
757-259-3253.

To register, scan the QR Code or visit:
<https://bit.ly/2026babyshower>

<https://www.gowata.org/148/Routes-Schedules>



Info
Sessions

Snacks

Raffles

Family
Friendly
Activities



Birth In Color is a registered 501(c)(3) non-profit organization



FUNDRAISER FOR Olde Towne Medical Dental Center

VIRTUAL COMMUNITY FUNDRAISERS



➤ **When**
Thursday, April 16, 2026

Place your order for pickup or delivery on Thursday, April 16!

➤ **Where**
Available at Panda Express locations nationwide

www.pandaexpress.com

➤ **How**
Online orders only

Apply code **9008283** in the Fundraiser Code box during online checkout at www.pandaexpress.com or via App

28% of sales will be donated to: Olde Towne Medical Dental Center

Non-profit health center that offers primary care and dental services to uninsured and under insured

Valid for online orders only. Panda Restaurant Group, Inc. ("PRG") reserves the right to cancel any and all fundraiser events at any time, if the Virtual Community Fundraising Terms and Conditions are not followed. If the organization is not in good standing with the IRS, Franchise Tax Board, or the State of California (for California organizations only), then donations may not be made to the organization. The organization must raise a minimum of \$150 in total event sales pre-tax when purchased with designated code at check-out, in order to receive 28% of all event sales (pre-tax amount). PRG does not charge the organization fees related to the event. Purchase(s) of gift cards and meals from Panda's School Lunch program do not count towards the fundraiser, but purchases made with gift cards will count. No portion of purchase is tax deductible. The donation from PRG to the organization is tax deductible. The organization receiving the donation must be a tax exempt organization. PRG will issue the donation check and provide an accounting statement to the organization within 45 days of the completion of the Event. Participants in the fundraiser may request the total dollar amount donated to the organization by emailing communityprograms@pandarg.com or by submitting the question at <https://community.pandaexpress.com/faq>



Kiwaniis
Club of Williamsburg

7th Annual

Purpose Driven Golf Tournament

Every round changes lives through direct support of our Headliner Grants program



— **Monday** —
April 27, 2026

Contact:
Mark Stefanick
469-325-7906
mstefanick18@gmail.com

\$175 per person includes
greens fee, golf cart,
breakfast, lunch, prizes

Where the focus is not just on the game, but on the lives changed through your participation.

Register



- Date:** Monday April 27, 2026
- Times:** 7:30 am registration and breakfast
9:00 am shotgun start, followed by lunch
- Where:** Golden Horseshoe Golf Club - Gold Course
401 South England Street, Colonial Williamsburg
- Format:** Captain's Choice



*Golden Horseshoe
Golf Club*
COLONIAL WILLIAMSBURG

Individuals & Foursomes

Individuals - \$175

Foursomes - \$700

You may register as an individual, a foursome and/or a sponsor.

If you are a foursome, enter the names and email addresses for each player.

DEADLINE to register is April 21st 2026

Sponsorships Available

- Title Sponsor \$3,000 (includes one foursome)
- Course Sponsor \$2,000 (includes one twosome)
- Lunch Sponsor \$1,500
- Swag Bag Sponsor \$1,200
- Ball & Tee Sponsor \$1,100
- Breakfast Sponsor \$850

- Putting Chaos Sponsor \$750
- Awards Sponsor \$750
- Beverage Sponsor \$500 (2)
- Hole Sponsor \$225 (36)
- Sponsor a Youth Golfer \$200 (8)

For Information and Online Registration Visit:

<https://williamsburgkiwanis.org/event/2026-annual-golf-outing/>



The Donate Your Birthday Campaign is when you forgo traditional gifts and instead ask friends and family to donate to your favorite charity (OTMDC!).

It is easy to do to!

Facebook:

- When it is close to your birthday go to Facebook and tap on "What's on your mind?"
- Below will be different icons, click the icon that looks like a pink coin with a heart (Raise Money).
- Search for your nonprofit (Olde Towne Medical and Dental Center, also known as Williamsburg Area Medical Assistance Corp.)
- Write what you would like to say to your friends and click post.

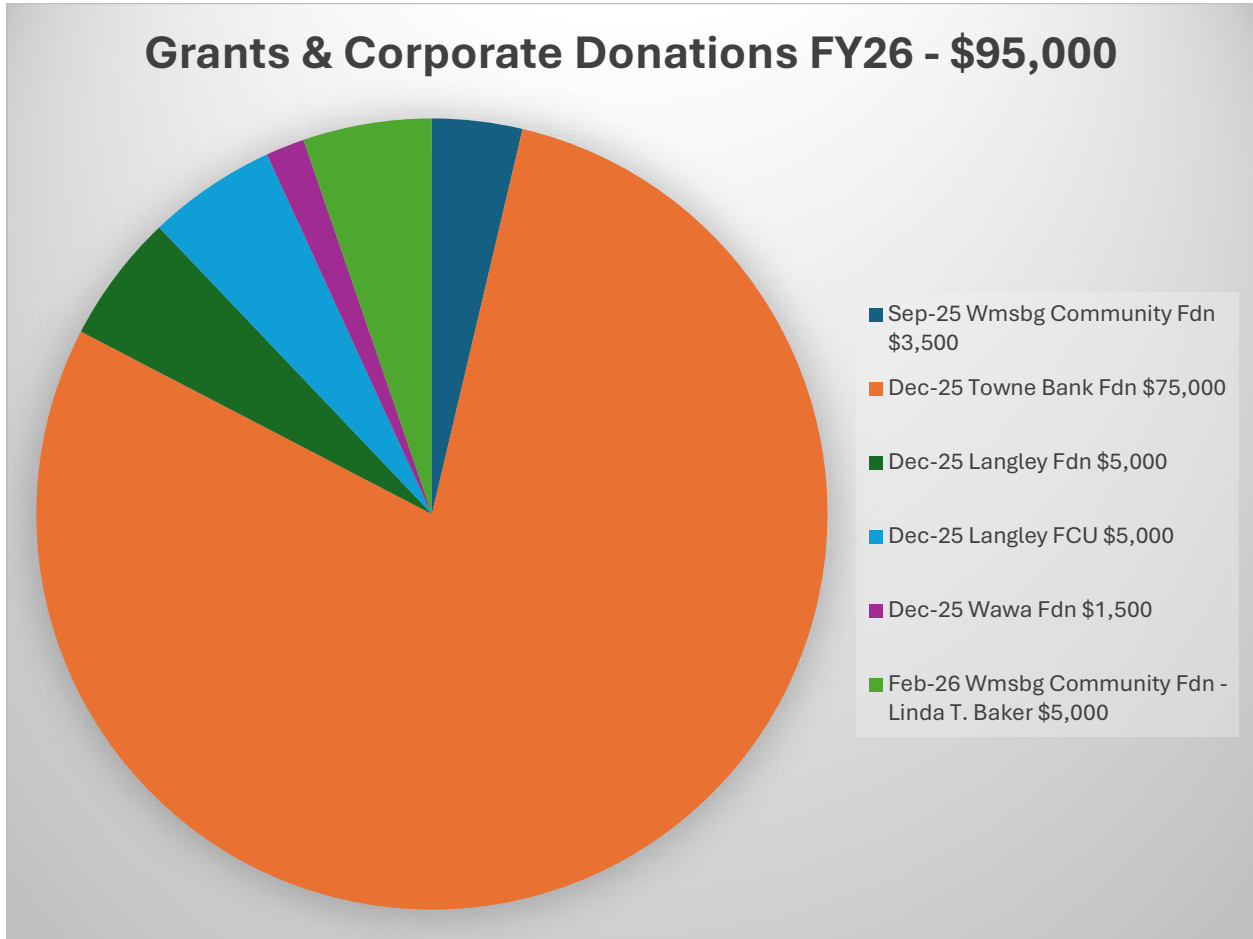
Instagram:

- When it is close to your birthday go to your Instagram profile and tap the + icon at the TOP of your profile page.
- Select from the menu the icon that looks like a pink coin with a heart (Fundraiser).
- Search for your nonprofit (Olde Towne Medical and Dental Center, also known as Williamsburg Area Medical Assistance Corp.)
- Add a picture and write what you would like to say to your friends and click Create Fundraiser.

Any donations come directly to Olde Towne Medical and Dental Center, you do not need to do anything else!

It is an easy way to support us, and although it is the Donate Your Birthday Campaign you can choose to post for donations at any time.

Sara E. Lewis
Grants & Development Coordinator
March 2026 Board Report



Grants Awarded - \$5,000

- **Williamsburg Community Foundation (WCF) Spring 2026 Grant Cycle** – Grant application for \$5,000 to fund technology upgrades was denied by WCF because they felt IT should be a core function of the organization. However, an individual with a Donor Advised Fund (DAF), Linda T. Baker, picked up the request and funded it in full.

Grants Denied - \$303,297

- **Bernard & Audre Rapoport Foundation** – LOI to apply for \$75,000 for Spanish-language translator.
- **Bolger Foundation** – Applied for \$100,000 to close out Technology Upgrades Campaign.
- **Virginia Health Care Foundation** – Denied request for \$128,297 for “Behavioral Health to Strengthen Whole-Person Care at OTMDC.” Requested meeting with Mr. Thompson, NP Robinson, and me to discuss and resubmit during next grant cycle.

Grant applications awaiting decisions

Decisions in April - \$1,000

- **Hampton Roads Academy Student Philanthropy Committee** – Requested \$1,000 (their limit). Awards presented April 16, 2026.

Decisions in May - \$50,000

- **Bernadine Franciscan Sisters Foundation** – Requested \$10,000 for operating support. This foundation supports Newport News, Hampton, York, Poquoson, and Gloucester. Decision May 18.
- **Dominion Energy Charitable Foundation** - \$20,000 to fund Greater Williamsburg Healthcare Access Sustainability Initiative. Decision is expected in May.
- **Max and Victoria Dreyfus Foundation** – Requested \$20,000 to support technology and cybersecurity upgrades. Application status update by the end of April with final decision by the end of May 2026.

Decisions in June - \$70,000

- **Richard & Caroline T. Gwathmey Memorial Trust** – Requested \$40,000 to fund the Greater Williamsburg Healthcare Access Sustainability Initiative. Decision in **June 2026**
- **George J. & Effie L. Seay Foundation** – Requested \$30,000 for Behavioral Health. Decision by **June 30**.

Decision in July - \$10,000

- **Atlantic Union Bank** – Applied for \$10,000 for help Sustaining Access to Essential Healthcare for the Greater Williamsburg Workforce and Residents. Decision after July 1, 2026.

Decisions in October – \$20,000

- **Dr. Scholl Foundation** – Requested \$20,000 to fund the Greater Williamsburg Healthcare Access Sustainability Initiative. Decision in October 2026; disbursement in **November 2026**.

Other

- **March 12** – Attended Williamsburg Community Foundation to receive award from Linda T. Baker for Technology Upgrades
- **March 12** – Met with O&E Committee and Development team

OTMDC Finance Committee
March 2026
Summary Report to the Board

Recommended Actions:

Approve the 990 for year end June 30, 2025

Financial Report: attached to this report is the ‘condensed’ year to date financial report for the month ending 2/28/2026.

Revenue: Total revenues from operations year to date (YTD) are \$2.663m, 79% of budget. This continues to include the receipt and recognition of \$900k in grant income. Gross patient revenue (before bad debt adjustment) is \$943k, 89% of budget. After \$25k of bad debt adjustment and expense, net patient revenue is \$918k. This includes Medicaid revenue of 168% of budget. For February of 2025 net patient revenue was \$669k, so we are \$249k above the previous year.

Public support revenue is \$188k, which is 47% of budget. Fundraising is at 34% of budget. Grant income is at 83% of budget, after the receipt and recognition of \$900k of grant revenue.

Expenses: With eight months or 66.67% of the year recorded prior to year-end adjustments, total expenses are \$2.5m, 71% of budget. Personnel costs are 69% of budget, with other (non-salary) operating costs at 81% of budget. The other operating costs include unbudgeted cyber security costs of \$97k.

Net income/loss from operations (revenues less expenses) YTD is \$141k vs. the annual budgeted net loss of <\$193k>. The YTD income includes the once annual \$900k in grant income. For the fiscal year ending 6/30/2025, the audited net income/(loss) from operations (without endowment changes) was <\$340k>.

The **endowment investment fund** is at \$6.884m as of February 28, 2026. The cost of the investment as of 6/30/2025 is \$5.895m. Dividends of \$645k have been reinvested and \$231k in cost removed with the \$275k transfer to cover cyber security expenses. This brings cost remaining in the fund to \$6.309m. The unrealized gain to-date is \$575k.

Current Assets: Cash balance is \$200k, an increase of \$139k from February 28, 2025. Receivables (net of allowance for doubtful accounts) are \$312k, an increase of \$103k from the February 2025 balance.

Other business/activities:

The next finance committee meeting is scheduled for May 13, 2026 at 4:30 pm.

Respectfully submitted,
Melissa Tucker, Chair, Finance Committee

OTMDC -- Summary Financial Results: YTD 2-28-2026

<u>Income-Expense:</u>					
	<u>Tot. Feb.</u>	<u>Total YTD</u>	<u>Annual Budget</u>	<u>Variance</u>	<u>% of annual</u>
<u>Revenue:</u>					
Local Government	\$ -	\$ 545,628	\$ 644,299	\$ (98,671)	85%
Patient Revenue	\$ 79,710	\$ 943,106	\$ 1,063,000	\$ (119,894)	89%
Less: Bad Debt "Adjustment"	\$ (3,789)	\$ (25,032)	\$ -	\$ (25,032)	0%
Less: Bad Debt Expense	\$ -	\$ (263)	\$ (45,000)	\$ 44,737	1%
Net Patient Revenue	\$ 75,921	\$ 917,812	\$ 1,018,000	\$ (100,188)	90%
Public Support	\$ 7,980	\$ 188,153	\$ 402,000	\$ (213,847)	47%
Special Events-Fundraising	\$ 500	\$ 39,647	\$ 115,000	\$ (75,353)	34%
Grants	\$ (324)	\$ 971,953	\$ 1,173,800	\$ (201,847)	83%
Misc. (inc. cash over/short)	\$ -	\$ -	\$ -	\$ -	0%
Total Revenue	\$ 84,077	\$ 2,663,193	\$ 3,353,099	\$ (689,906)	79%
<u>Expenses:</u>					
Total Personnel	\$ 252,774	\$ 1,989,602	\$ 2,886,689	\$ (897,087)	69%
Total Non-Personnel Exp.	\$ 61,834	\$ 532,588	\$ 654,850	\$ (122,262)	81%
Furn/Equipment (Total)	\$ -	\$ -	\$ 5,000	\$ (5,000)	0%
Total Expenses	\$ 314,608	\$ 2,522,189	\$ 3,546,539	\$ (1,024,350)	71%
Net Income	\$ (230,531)	\$ 141,003	\$ (193,440)	\$ 334,443	-73%
Transfer From/(To) Endowment	\$ -	\$ 275,000	\$ 193,440	\$ 81,560	142%
Net Cash Change After Trfr.	\$ (230,531)	\$ 416,003	\$ -	\$ 416,003	0%
<u>Investment Fund Summary:</u>					
		<u>Curr. Mo.</u>			
Beg. Balance, cost 6/30/2025		\$ 5,895,108			
Cost of transfer to operations		\$ (231,492)			
Dividends reinvested		\$ 645,443			
Cost, 11/30/2025		\$ 6,309,059			
+/-: Gains/Losses, through 6/30/2026		\$ 574,734			
End Balance		\$ 6,883,793			
<u>Current Assets Report</u>					
		<u>2/28/2026</u>	<u>YTD</u>	<u>2/28/2025</u>	
			<u>Diff.</u>		
Cash		\$ 200,372	\$ 138,720	\$ 61,651	
Investments		\$ 6,883,793	\$ 320,603	\$ 6,563,190	
SUBT.		\$ 7,084,164	\$ 459,323	\$ 6,624,841	
Total Receivables		\$ 414,252	\$ 126,866	\$ 287,386	
Less: Allow. For Doubtful Accts.		\$ (102,191)	\$ (24,179)	\$ (78,011)	
Net Receivables		\$ 312,061	\$ 102,687	\$ 209,375	
Total Current Assets		\$ 7,396,226	\$ 562,010	\$ 6,834,216	

Planning and Performance Committee - March 2026 Update

The Committee is working with the OTMDC Executive Director to update progress regarding execution of the Strategic Plan.

- Service Component review complete
- Finance Component review complete
- Quality Component review complete
- Growth Component review in progress

Based on the review, a scoresheet is regularly updated for distribution to the Board. The scoresheet provides a clear indication of progress as green, yellow and red flags that show progress that meets or exceeds expectations, is below expectations or is an area of particular concern. Clarifying comments have been included for each item reviewed and the latest update has been made available to the Board.

Additional comments are provided in the Committee meeting notes of 2/18/26.

Notable Observations

Quality

- Working to further EHR. Following one year of work to participate in the “Sentra Quality Cares” program, a partnership with Sentara still remains a possibility. Alternatively, the staff of OTMDC is evaluating the use of an upgraded version of Allscripts to meet our needs.
- Performance measures pertaining to patients served are regularly reported to the Board and further metrics relating to quality of care will be added to comply with FQHA reporting requirements.
- Chronic disease management is measured for diabetic patients and expansion to hypertension and hyperlipidemia tracking has been recommended.

Growth

- Improving community awareness of OTMDC remains a focus of our social media outreach programs. Traffic on these sites has been stagnant in recent months. We established a new Instagram page following the 2025 security breach.
- Outreach events have been ongoing and every opportunity for future involvement is evaluated when available.
- Growing our ability to serve the behavioral health needs of our patients remains a critical need.
- Remaining items: mental health resources and increased dental care capacity to be reviewed.

Other Items

- The Committee will work with the Executive Director to determine the role the Committee will take in furtherance of the FQHC look-alike initiative.
- Next Committee meeting April 15, 5:00 pm.

Service

GOAL	MEASURES	STATUS	NOTES
Enhance overall patient experience and satisfaction with OTMDC	<ul style="list-style-type: none"> Increase in first-call resolution 	yellow	Reduce call-backs or follow-up necessity. Effectiveness of the new phone system. Patient feedback in person, patient satisfaction survey question.
	<ul style="list-style-type: none"> Improved timeliness of results reporting 	green	Allscripts EHR feedback and online access to minimal reports. Phone call reporting within 24 hrs. (Phressia temp use 12-mths) - Evidence: patient/clinician notes with monthly chart audits.
	<ul style="list-style-type: none"> Improved Net Promoter Score (NPS) 	red	Pending selection/implementation of new system (Press Ganey, EPIC, etc.)
	<ul style="list-style-type: none"> Higher post-visit survey response rate and satisfaction scores across key areas: wait time, communication, treatment clarity, overall care, and facility environment 	red	Pending selection/implementation of new system (Press Ganey, EPIC, etc.)
	<ul style="list-style-type: none"> Implementation of dental satisfaction survey 	red	Pending selection/implementation of new system (Press Ganey, EPIC, etc.)
	<ul style="list-style-type: none"> BUDGET IMPACT: New phone system cost TBD; installation planned by County in Q1. 	yellow	6 mths - yr for county-wide implementation and full access to reporting features
			Consider paper short survey in lieu of or until EPIC satisfaction survey purchase. (Randy)
Increase access to primary and specialty care	<ul style="list-style-type: none"> Number of telehealth visits (medical, dental) per month 	red	Providers need to become accustomed to input data timely. Experience needed to categorize correctly. (Needed if "Look alike" or FQAC approved) Expecting 2-4 (Tue/Thu) per provider.
	<ul style="list-style-type: none"> Decrease in wait times for specialty care (or satisfied) 		Specialty dependent - need metrics set before measurement determined?
	<ul style="list-style-type: none"> Increased referral completion rates 		Need metrics set before measurement determined?
	<ul style="list-style-type: none"> Identified transportation gaps and shared with community stakeholder (reduced no-shows related to transportation?) 		<u>Qualitative</u> feedback from patients (vs. a reported metric)
			Follow-up with NP Robinson for aggregate numbers for each section. (Aaron)

Enhance OTMDC's ability to serve patients whose primary language is not English	<ul style="list-style-type: none"> Increased percentage of Multilingual employees 	green	# of multilingual employees (2 fluent in Spanish) Goal to add 2 part-time translators.
	<ul style="list-style-type: none"> Growth in volunteer hours for translation support 		# of volunteers (2 @ 12/25)
	<ul style="list-style-type: none"> % of patients best served in another language 		Non-traditional employee/volunteer languages
	<ul style="list-style-type: none"> Interpretation service utilization rates 	green	Language Line reporting (monthly invoice information?) Pocket-Talks (wifi improvements)
	<ul style="list-style-type: none"> BUDGET IMPACT: Potential addition of two part-time translators; cost analysis pending. 		
			Not actively recruiting translator positions.
Enhance support of social needs for the underserved.	<ul style="list-style-type: none"> Number of patients actively case managed 		Allscripts EHR, CBH, Bacon St. reporting data (monthly?)
	<ul style="list-style-type: none"> Follow-up appointment completion rates 		
	<ul style="list-style-type: none"> Volume and type of social service referrals (e.g., transportation, food, Medicaid/ insurance) 		
	<ul style="list-style-type: none"> BUDGET IMPACT: Potential grant-funded position, currently supported through BOA agreement and collaboration with CBH. 	red	Need behavioral health service provider given recent Bacon St. closure (pursuing grant funding)

Growth

GOAL	MEASURES	STATUS	NOTES
Improve community awareness of OTMDC	<ul style="list-style-type: none"> Growth in social media engagement and 	yellow	Cyber security issue last year was a setback and we have established a new Instagram page
	newsletter open rates		In process
	<ul style="list-style-type: none"> Increase in community meeting/ workgroup participation 	green	A recent example was attendance at the Sentara Chamber of Commerce
	<ul style="list-style-type: none"> Patient-reported referral source data 	green	"Follow My Health" will be used for patient satisfaction and reporting

	<ul style="list-style-type: none"> • BUDGET IMPACT: Covered under existing marketing and development 		
Grow community partnerships	<ul style="list-style-type: none"> • Implementation of partnership strategy 	green	Partnership relationships continue. Need to develop further behavioral health partners
	<ul style="list-style-type: none"> • Increase in number of active community and corporate partnerships 		
	<ul style="list-style-type: none"> • Growth in patient referrals from partner employers 	yellow	Improvements can be made here to get more referrals from our partners to whom we refer patients
Expand available mental health resources	<ul style="list-style-type: none"> • Number of referrals between OTMDC and partners 	red	Searching for new partners for this critical need
	<ul style="list-style-type: none"> • Percentage of completed mental health referrals 		
	<ul style="list-style-type: none"> • Reduction in average wait time for mental health appointments 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Supported by existing grant agreements. 		
Increase dental care capacity	<ul style="list-style-type: none"> • Increase in weekly dental appointment availability 		
	<ul style="list-style-type: none"> • Decrease in average wait time for adult dental visits 		
	<ul style="list-style-type: none"> • Higher percentage of same day dental appointments filled 		
	<ul style="list-style-type: none"> • Growth in number of pediatric dental patients and preventive care delivery 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Growth in services expected to increase Medicaid (Dentaquest) revenue 		

Quality

GOAL	MEASURES	STATUS	NOTES
Enhance ability to maintain and share electronic health	<ul style="list-style-type: none"> • Epic implementation progress (% of milestones completed on time) 	red	Worked with Sentara for 1 yr to setup with "Sentara Quality Cares". Further meetings are planned with senior

records (EHR)			Sentara personnel while we investigate an update to Allscripts
	<ul style="list-style-type: none"> • Staf EHR training completion rates 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Supported through partnership with Sentara Quality Care Network (SQCN) and funding from a Sentara Cares grant. 		
Track and benchmark clinical performance measures to other safety net providers	<ul style="list-style-type: none"> • Dashboard in use and shared with Board quarterly 	green	Dashboard included in the Board report. Additional items to be added as needed.
	<ul style="list-style-type: none"> • Regular reporting of patient demographics, quality of care indicators, and service delivery metrics 	yellow	Demographic information is captured and reported. Quality of care and other metrics pending
Maintain team-based approach to chronic disease management	<ul style="list-style-type: none"> • Outcome improvements for diabetic patients (e.g., 80% of patients with improved HbA1c levels) 	green	Developing a patient cohort for reporting
	<ul style="list-style-type: none"> • Recommendations for expansion to other chronic conditions 		Hypertension, hyperlipidemia

People

GOAL	MEASURES	STATUS	NOTES
Continue to build a culture that supports OTMDC's core values and connects people to purpose	<ul style="list-style-type: none"> • Completion of professional development goals 		
	<ul style="list-style-type: none"> • Reduction in staf turnover rate. 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Potential increase in headcount; costs to be evaluated. 		
Maximize the efficiency of the OTMDC team	<ul style="list-style-type: none"> • Patient satisfaction scores by provider or department 		
	<ul style="list-style-type: none"> • % of roles with cross-coverage or 		
	backup support		

	<ul style="list-style-type: none"> • Progress on departmental goal achievement 		
Create an environment that encourages continuous learning	<ul style="list-style-type: none"> • Training completion rates 		
	<ul style="list-style-type: none"> • Implementation and use of onboarding plans and resources 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Requires new line item or increase to existing training and development budget. 		
Optimize the use of volunteers and students to support OTMDC operations	<ul style="list-style-type: none"> • Volunteer engagement levels 		
	<ul style="list-style-type: none"> • Number of student placements and task alignment 		

Finance

GOAL	MEASURES	STATUS	NOTES
Strengthen grant writing capacity	<ul style="list-style-type: none"> • Hire of dedicated Grant Coordinator 	green	Part-time filled by Sara Lewis (20 hr/wk) potential for more hours in the future? 1-year contracted position that can then be renegotiated (full/part)
	<ul style="list-style-type: none"> • Increase in total grant funding secured annually 	green	\$200k goal per fiscal year - YTD ~\$100k+
	<ul style="list-style-type: none"> • Greater revenue diversification (measured by % from varied sources) 	green	Funding sources - donor giving & mgmt, estate planning discussion with potential donors/philanthropists (Rashid conducting meetings); contacts from Sara Lewis assisting as well (Cabell Foundation - capital campaign) - churches, Dominion Energy, Towne Bank, Wlmbg Foundation, etc.
	<ul style="list-style-type: none"> • BUDGET IMPACT: Part-time Grants and Development Coordinator identified; funding pending implementation. 		
Increase and diversify fundraising	<ul style="list-style-type: none"> • Increase in donations from corporate and local business 		Towne Bank \$75K grant (March) Langley, Dominion Energy, WCF, churches, increase community events

	donors		(Kiwanis, FC golf tournament), Mar '27 wine festival (Wlmg Winery), '28 35th Gala
	<ul style="list-style-type: none"> Annual jurisdictional funding maintained or increased 		All 3 have been submitted by deadline (JCC, York Cty, City of Wlmg) - Apr/May expected response; asked for 3% increase year-over-year; opportunity to submit to NN (New Kent, Surry, West Point potentials in future)
	<ul style="list-style-type: none"> Communication of value: patients served, average cost per patient, and total value of services provided 		Data dashboard by items of importance to donor/jurisdiction; Medicaid/Medicare costs reports vs. expenses resource for "story" of OTMDC value (shortfall = expense minus revenue to determine additional funding needs); total value to community
	<ul style="list-style-type: none"> BUDGET IMPACT: Donor management specialist and consultant under consideration; cost analysis pending. 	yellow	2 candidates - official position pending; in-house Rashid Moore providing donor funding events/mtgs with no additional expense at this time
Optimize revenue	<ul style="list-style-type: none"> Increase in patient insurance enrollment (Medicaid/Medicare) 	yellow	More opportunity likely in 2027 due to continuing decision making from Administration / budget bill
	<ul style="list-style-type: none"> Growth in average reimbursement rate 		AIR (all inclusive rates) used by rural health increasing \$152 (2025) to \$165 (2026) per Medicaid patient (2024 \$139)
	<ul style="list-style-type: none"> Increase in net collection rate 	green	Attention to billing coding to ensure correct specification, compliance, and maximizing reimbursement (reduction in write-offs from previous years) Lisa Tinker and Maggie Beamon follow-up on denied claims to re-classify/code as needed
	<ul style="list-style-type: none"> Reduction in accounts receivable days 	green	Lisa Tinker AR processing - typically 50-60 days (within target)
	<ul style="list-style-type: none"> BUDGET IMPACT: Partnering with Cenevia, Inc. to improve billing, coding, and credentialing; costs included in operational planning. 	n/a	Improvements to billing, coding, etc. despite the end of the partnership (much learned during the partnership experience) Maggie Beamon now certified in billing/coding

Evaluate fiscal agent relationship with James City County (JCC)	<ul style="list-style-type: none"> • Completion of environmental scan 	yellow	Potential challenges if implementing look-alike status; Exec Dir position cannot be affiliated with JCC - would require restructure change (i.e. no VRS); clinic building future set at current location within JCC facility
	<ul style="list-style-type: none"> • Updated Memorandum of Agreement (if needed) 		
	<ul style="list-style-type: none"> • BUDGET IMPACT: Ongoing discussions with county on fiscal relationship and FQHC/ Look-Alike options. 		

Standard #1: 51% must be patients served by health center

	Non-patients	Patients	Juris	Total
<i>Current Board</i>	12 (92%)	1 (8%)	3	16
Option 1: add 5 patients	12 (67%)	6 (33%)	3	21
Option 2: add 5 patients + 4 non-patients become patients	8 (44%)	10 (56%)	3	21
Option 3: add 9 patients (replace next 3 vacancies [non-patients] + add 6 patients)	9 (47%)	10 (53%)	3	22
Option 4: add 5 patients; reduce non-patient members by 7 (not filling next 3 vacancies & asking 4 ppl to resign)	5 (46%)	6 (54%)	3	14

Option 2 technically meets the standard, but demographic characteristics of Patient members also must fit

*Option 3 note: we must find a treasurer. Two of the 3 Non-Patient Members are Non-white and 1 is Female.

Standard #2: Patient Board Members must, as a group, represent the individuals served by the health center.

Patients	Male	Female	White	Non-White
<i>Patients (as of January 2026)</i>	36%	63%	23%	77%
Patient Board Members; Option 2 or 3 (for compliance, 10 members)	4(40%)	6(60%)	2(20%)	8(80%)
Patient Board Members; Option 4 (for compliance, 6 members)	2(33%)	4(66%)	2(33%)	4(67%)

To meet this standard, need 6/10 patient members to be women, 8/10 patient members non-white

Standard #3: Non-patient members are representative of the community served by the health center (N=12)

Non-Patients	Male	Female	White	Non-White
Service area demographics	49%	51%	73%	27%
Current non-patient board members	8/12 (66%)	4/12 (33%)	9/12 (75%)	3/12 (25%)
Option 1: Non-patient board member make-up for compliance (replace 2 male with 2 female non-patients; add 5 patient members]	6/12 (50%)	6/12 (50%)	9/12 (75%)	3/12 (25%)

Standard #4: No more than one-half of the Non-Patient Members can earn more than 10% of their annual income from healthcare industry.

Currently, no more than 4/12 (33%) of Non-Patient Members work in healthcare.

<u>Term Exp</u>	<u>Name</u>	<u>Representing</u>	<u>Leadership/appointment Term expires</u>
06/26	Rashid Jones	Community	Vice Chair: 06/26
06/27	Melissa Tucker	Community	Treasurer: 06/27
06/27	Henry Ranger	Health/Pharm	
06/27	R. Scott Herr	Community	Chair, P&P: 06/27
06/28	Rebecca Bruhl	Community; Public Health	Chair: 06/28
06/30	David Aday	Community	Chair, G&N: 06/29
06/30	Robin Nelheubel	Community; Health	
06/30	Cornelius Powell	Community; Health	
06/31	Ron Kirkland	Community;	
06/31	Karen Stokes	Faith Community; Health	
06/31	Randy Walton	Community; Behavior Hlth	
06/31	Cris Becerra	Patient	
06/32	Terry Moran	Community	Chair, O&E: 06/30
	Larry Snyder	Wmbg Juris Alternate	
	Barbara Null	JCC Supervisors	

	Ayana Williams	Wmbg Supervisors	
	Doug Holroyd	York Co. Supervisors	

Communication and Development Committee

March 16, 2026

- 1) OTMDC / MGA Charity Golf Classic: Past and new sponsors are signing up. Online auction launching 3/31. OTMDC will send email to all lapsed donors to promote the auction. Successful bidders can also add an additional donation and cover the 2.9% Stripe credit card processing fee.
Promotion of auction via the Fords Colony (FC) Talk of The Colony (ToC) April edition delivered to all homes (2,800), WHIFC a weekly FC email blast, FC Facebook, and FC Country Club Weekly email.
- 2) Reaching out to Rob Wittman for a Federal donation similar to Colonial Behavioral Health.
- 3) Setting up a meeting with Lackey clinic
- 4) Request for list of lapsed donors sent to Rashid Jones to develop strategy for outreach