

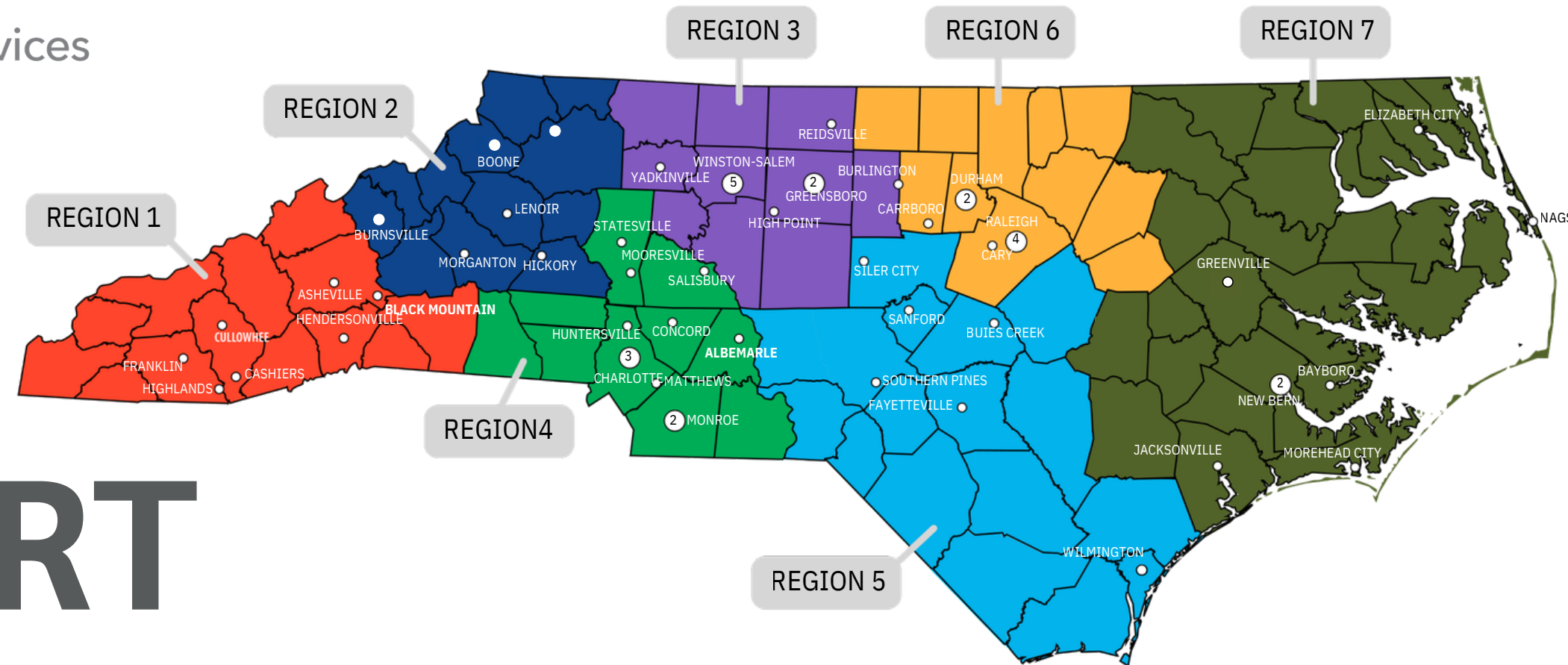


North Carolina Association
of Free & Charitable Clinics

Medical | Pharmacy | Dental | Social Services

2025 ANNUAL SURVEY REPORT

Improving the health and well-being of the uninsured
and the underinsured in North Carolina.



OUR MISSION

Support and advocate for our member organizations to provide healthcare for the uninsured and underserved of North Carolina.

OUR VISION

All people will have equitable access to quality health care, regardless of ability to pay.





THE NORTH CAROLINA ASSOCIATION OF FREE & CHARITABLE CLINICS

The North Carolina Association of Free and Charitable Clinics (NCAFCC) Annual Survey allows our member organizations the opportunity to enhance their quality of care, strengthen their positions as health care safety-net providers and demonstrate to the philanthropic community that their investments “make a difference.”

NCAFCC was the first in the national free and charitable clinic sector to implement a measurable health outcomes program that underscores our commitment to provide quality care to our patients on par with the care insured individuals receive from private providers. We’ve come a long way since first implementing the NCAFCC Annual Survey and we’ve witnessed some remarkable achievements by our member organizations.

The NCAFCC Annual Survey process reflects our dedication to helping and improving the health of the medically underserved in North Carolina. It is our hope to build upon earlier achievements while expanding our vision to create new ones. It is our belief that the free and charitable clinics in North Carolina have a compelling story to tell and the NCAFCC Annual Survey continues to serve as a vital tool for telling that story.

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LETTER FROM OUR CEO

As we reflect on 2025, I am reminded that healthcare is constantly evolving, and our network of North Carolina's free and charitable clinics continues to evolve with it. Two years ago marked a historic milestone as Medicaid Expansion took full effect across North Carolina. More than 700,000 adults gained access to healthcare coverage through Medicaid, representing one of the most significant changes to our state's healthcare landscape in decades.

As expected, our member clinics experienced an initial decline in patient volume as many uninsured individuals transitioned into Medicaid coverage. However, by the end of 2025, the story had changed. The ongoing need for compassionate, accessible care remained strong, and our clinics once again demonstrated why they are an indispensable part of North Carolina's healthcare safety net.

In 2025, our member clinics provided **149,843 medical, dental, and behavioral health visits to 64,425 unduplicated patients**. While we experienced a temporary decrease in patients immediately following Medicaid Expansion, by year's end our clinics had served **3.99% more unduplicated patients** than in 2024. These numbers reinforce an important reality: even with expanded insurance coverage, thousands of North Carolinians continue to face barriers to accessing affordable healthcare.

The impact our members make with limited resources continues to inspire me. Collectively, North Carolina's free and charitable clinics delivered **\$351,845,639** in healthcare services while operating on a combined budget of just **\$46,789,121**. Few sectors can demonstrate this level of return on investment. Every donated dollar, volunteer hour, and community partnership is multiplied many times over into life-changing healthcare for individuals and families who would otherwise go without care. I continue to be amazed by the efficiency, innovation, and unwavering commitment of our member clinics.



April Cook
NCAFCC, CEO

LETTER FROM OUR CEO

As we look ahead, 2026 presents significant challenges. Federal policy changes under H.R. 1, combined with changes enacted by the North Carolina General Assembly, will create new hurdles for healthcare providers across our state. At the same time, the expiration of enhanced Affordable Care Act premium subsidies and changes to Medicaid eligibility and enrollment policies are expected to increase the number of uninsured North Carolinians. Many individuals who lose coverage will once again turn to free and charitable clinics for care. These policy changes come at a particularly difficult time for nonprofit organizations. Increased demand for services will coincide with greater competition for charitable funding as nonprofits across multiple sectors face similar financial pressures. The need for strong, sustainable safety-net providers has never been greater.

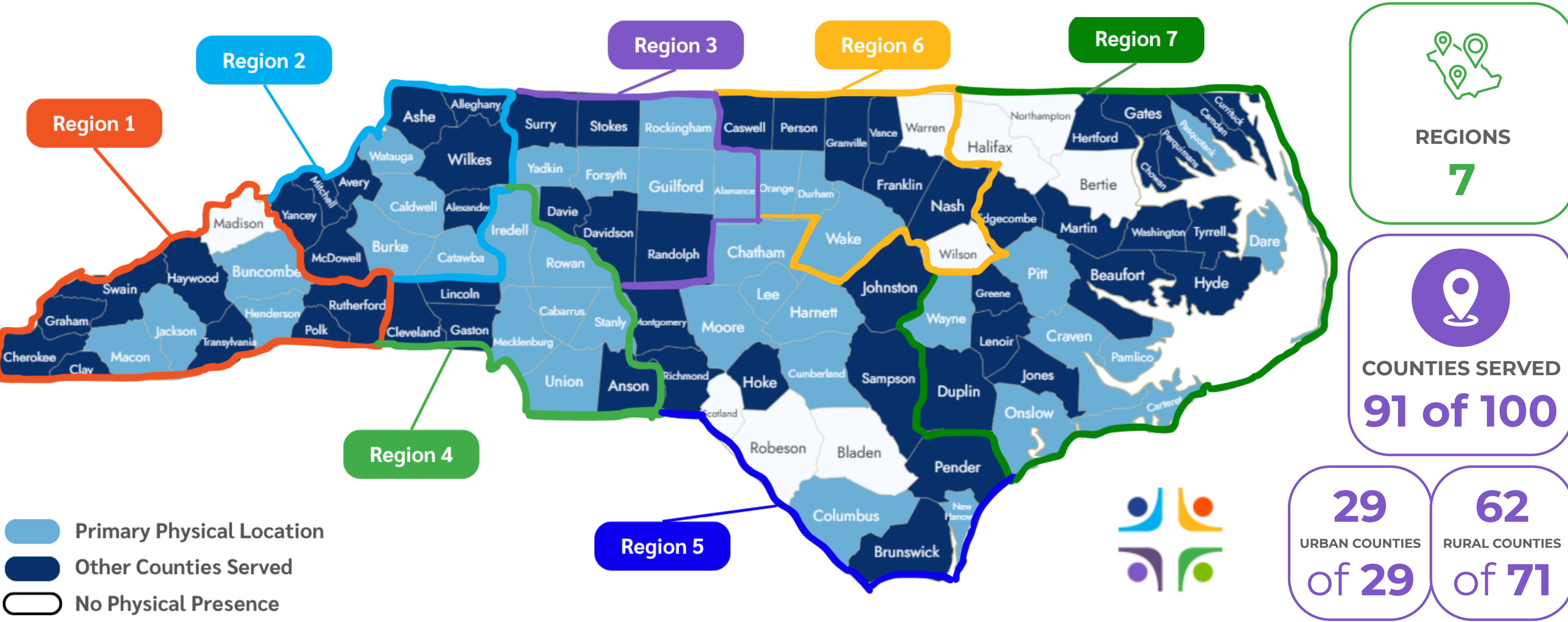
Throughout 2025, the North Carolina Association of Free and Charitable Clinics remained committed to strengthening our members and advocating on their behalf. We hosted three statewide leadership workshops, provided a strong voice for our members through legislative advocacy in Raleigh, and facilitated regular regional meetings that fostered collaboration, innovation, and peer learning across our network. Looking ahead to 2026, we are excited to bring our members together once again at our Annual Member Conference in Chapel Hill, where we will continue building the partnerships, knowledge, and leadership necessary to meet the challenges ahead.

None of this work would be possible without the dedication of our clinic leaders, staff, volunteers, board members, healthcare professionals, community partners, donors, funders and policymakers who believe that access to healthcare should not depend on a person's ability to pay. Together, we are strengthening North Carolina's healthcare safety net and improving the health of our communities.

Thank you for your continued commitment to this mission. While the challenges before us are significant, I remain confident that together we will continue to ensure that every North Carolinian has access to compassionate, high-quality healthcare when they need it most.

April Cook
NCAFCC, CEO

COUNTIES SERVED IN 2025 BY 55 MEMBERS



2025 NCAFCC MAJOR FINDINGS



VALUE OF PRESCRIPTION MEDICATIONS

\$122,011,226

Total value of prescription medications provided to patients

50 Members Reporting



ED DIVERSION SAVINGS

\$363,614,700

Estimated healthcare costs avoided through non-emergency care.

55 Members Reporting



PATIENTS SERVED

64,425

Unduplicated patients served across North Carolina.

55 Members Reporting



PATIENT-PROVIDER VISITS

149,843

Total patient-provider visits provided.

48 Members Reporting



VALUE OF SERVICE TO PATIENT

\$3,562.70

Value of services provided per patient served.

55 Members Reporting



VALUE OF INVESTMENT

\$6.52

Value of investment per for every \$1 spent.

55 Members Reporting



TOTAL VALUE OF SERVICES TO COMMUNITY AT LARGE

\$351,845,639

The estimated value of services and resources provided to patients and the community.

55 Members Reporting



VOLUNTEERS

10,545

The total number of individuals who collectively contributed 246,618 volunteer hours.

54 Members Reporting

2025 NCAFCC PATIENTS SERVED



PATIENTS SERVED

64,425

Total Unduplicated
Patients in 2025

NEW PATIENTS

21,812

Total New Patients in 2025

MEMBERS REPORTING

55

TOTAL # OF UNDUPLICATED PATIENTS SERVED

2024

61,955

58 MEMBERS REPORTING



2025

64,425

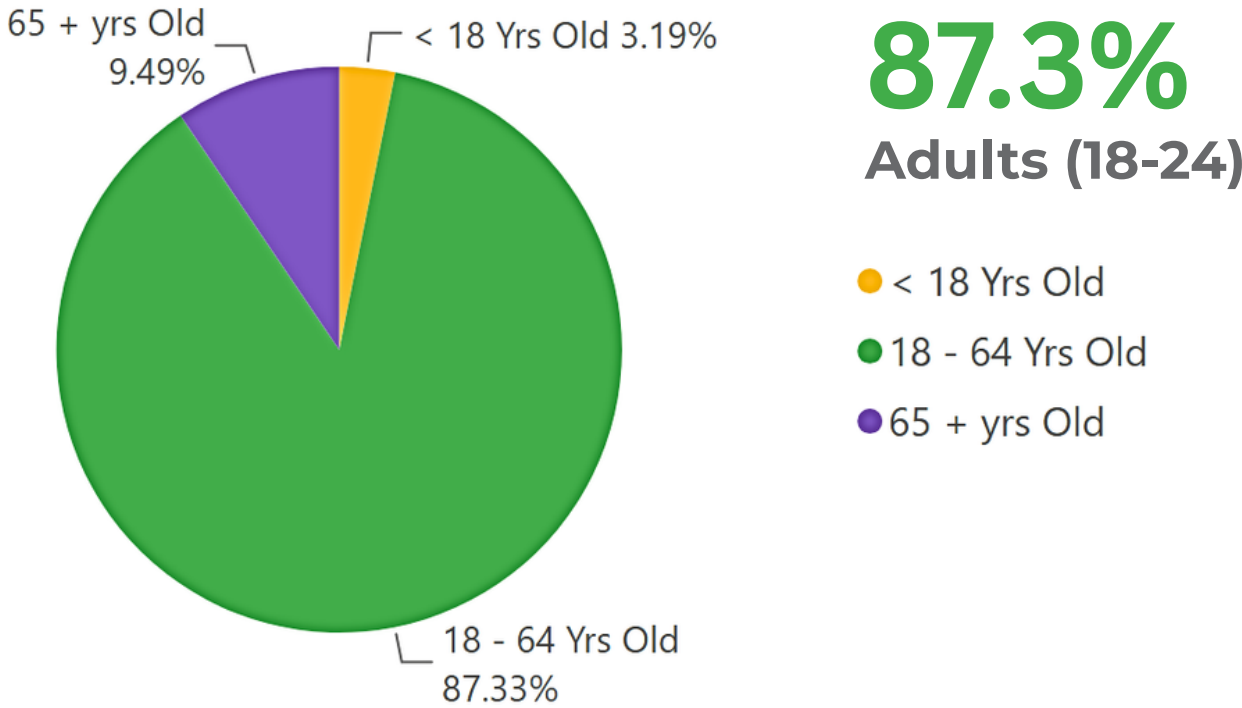
55 MEMBERS REPORTING

Even with fewer reporting member clinics, patient volume increased, highlighting the significant impact and capacity of North Carolina's free and charitable clinics.

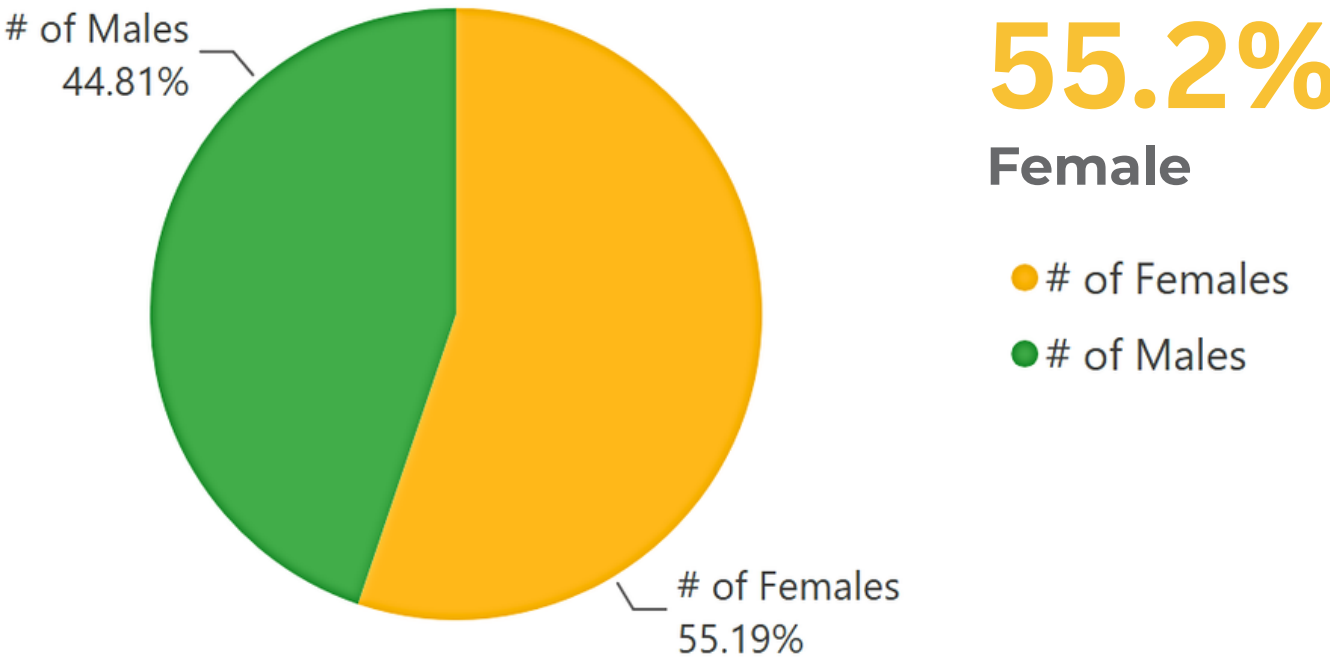
2025 NCAFCC PATIENT DEMOGRAPHICS



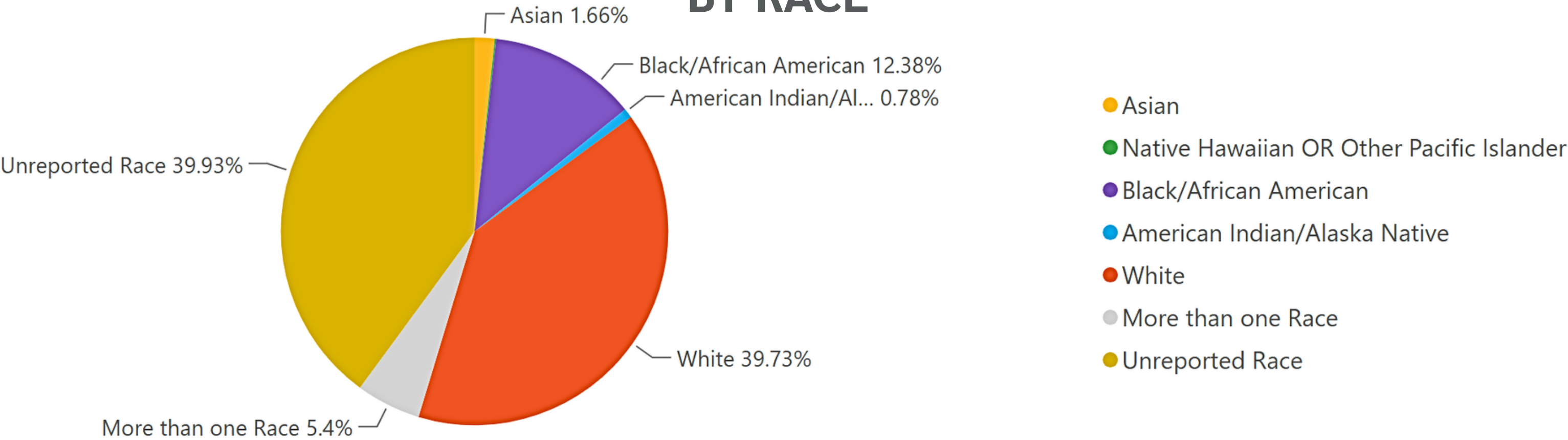
BY AGE



BY SEX



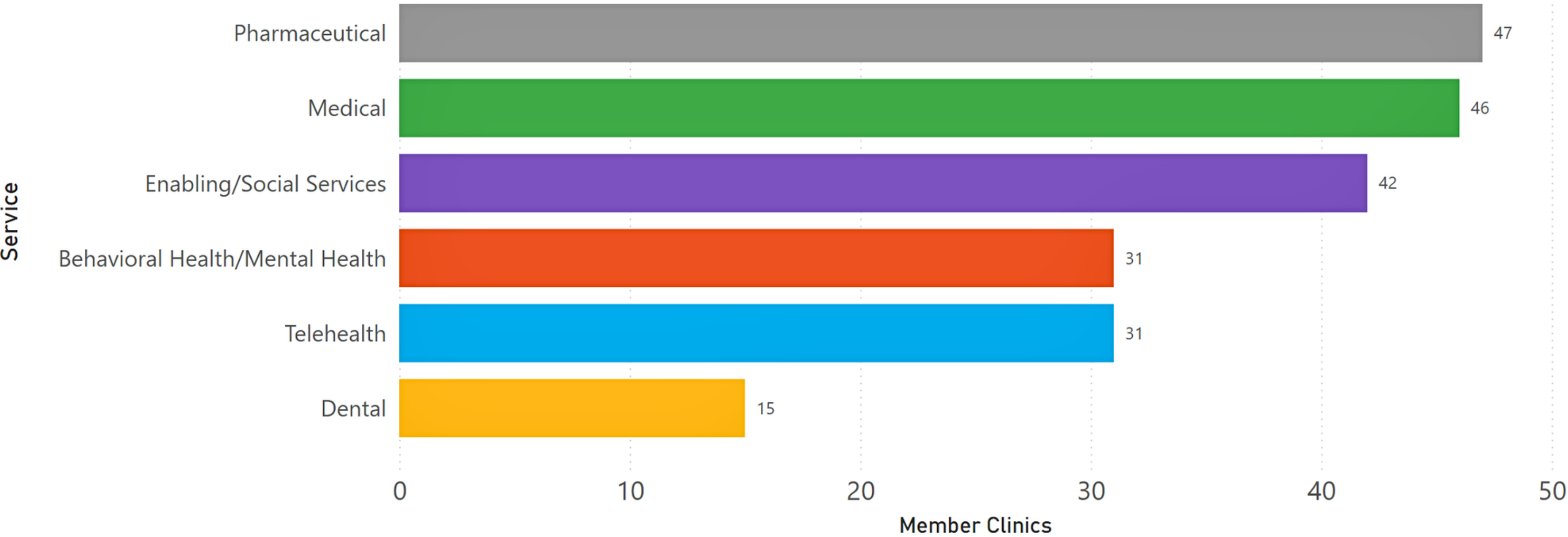
BY RACE



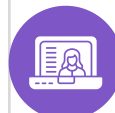
FREE & CHARITABLE CLINICS' SERVICE & OPERATIONS



MEMBER CLINICS OFFERING SERVICES



HOURS OF OPERATION



ADMINISTRATIVE
2,022
Hours Per Week
54 Members Reporting



MEDICAL
1,446
Hours Per Week
46 Members Reporting



BEHAVIORAL/MENTAL HEALTH
615
Hours Per Week
31 Members Reporting



DENTAL
337
Hours Per Week
15 Members Reporting

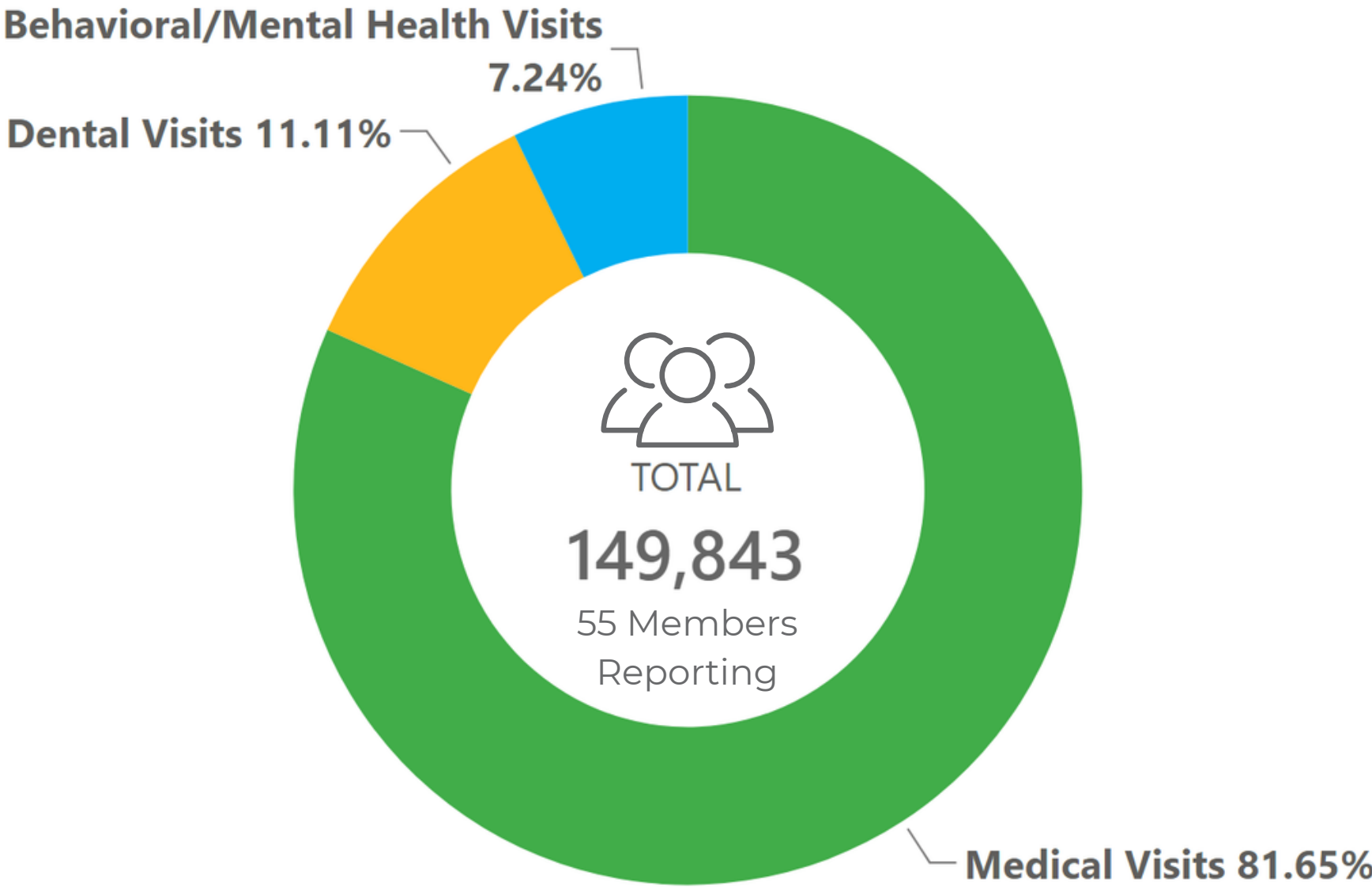


PHARMACY
772
Hours Per Week
30 Members Reporting

CARE DELIVERED ACROSS OUR NETWORK



PATIENT-PROVIDER VISITS



Medical Visits
122,346
46 Members reporting



Dental Visits
16,647
26 Members reporting

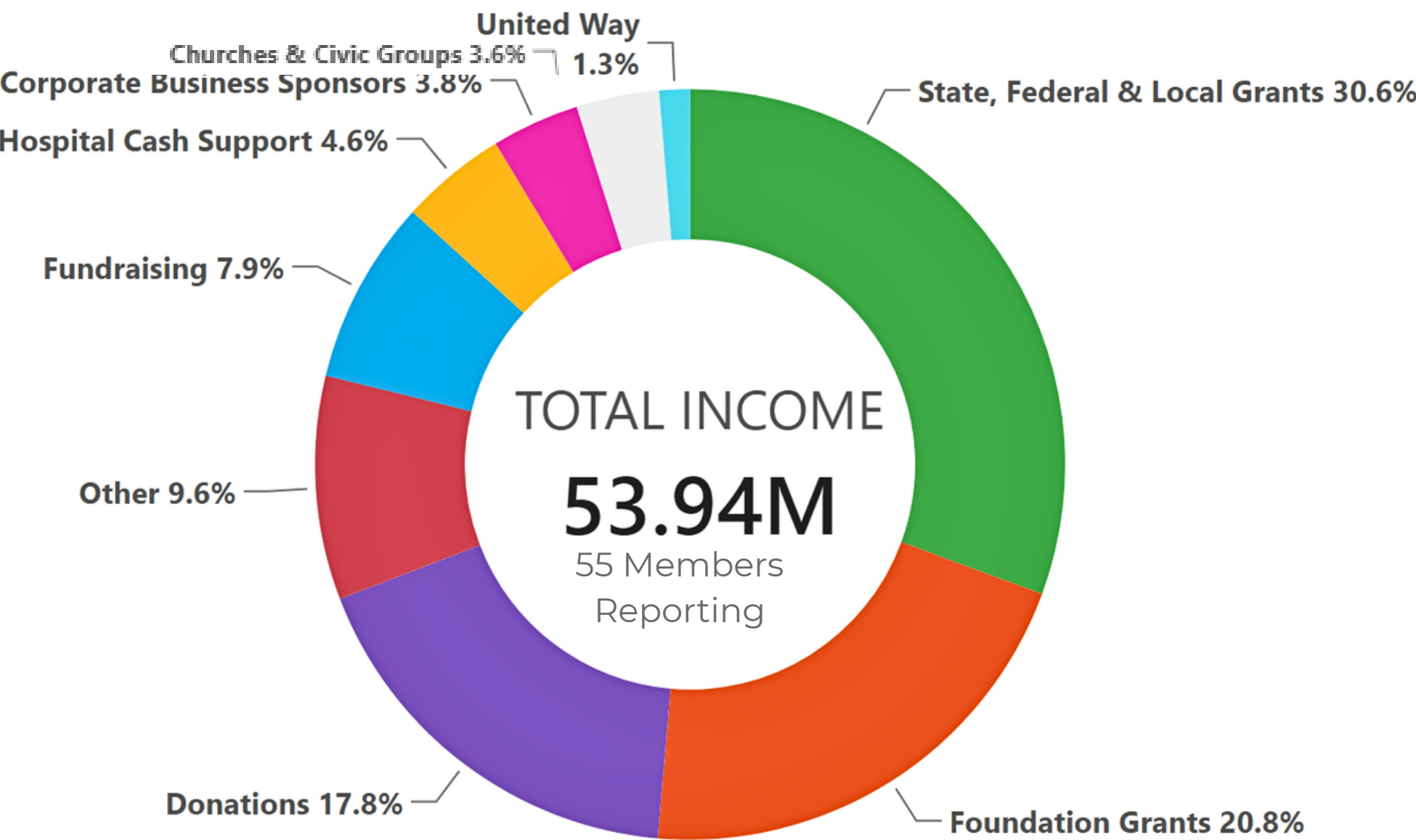


Behavioral/Mental Health Visits
10,850
31 Members reporting



More than four out of every five patient-provider visits were medical visits, demonstrating the critical role free and charitable clinics play in providing primary care across North Carolina.

FREE & CHARITABLE CLINICS' FINANCIAL SUPPORT



INCOME BY SOURCE	%	\$	Members Reporting
State, Federal & Local Grants	30.6%	\$16,508,621	50
Foundation Grants	20.8%	\$11,203,784	46
Donations	17.8%	\$9,598,747	52
Other	9.6%	\$5,196,159	43
Fundraising	7.9%	\$4,283,806	37
Hospital Cash Support	4.6%	\$2,470,046	25
Corporate Business Sponsors	3.8%	\$2,041,466	33
Churches & Civic Groups	3.6%	\$1,925,609	43
United Way	1.3%	\$711,874	25

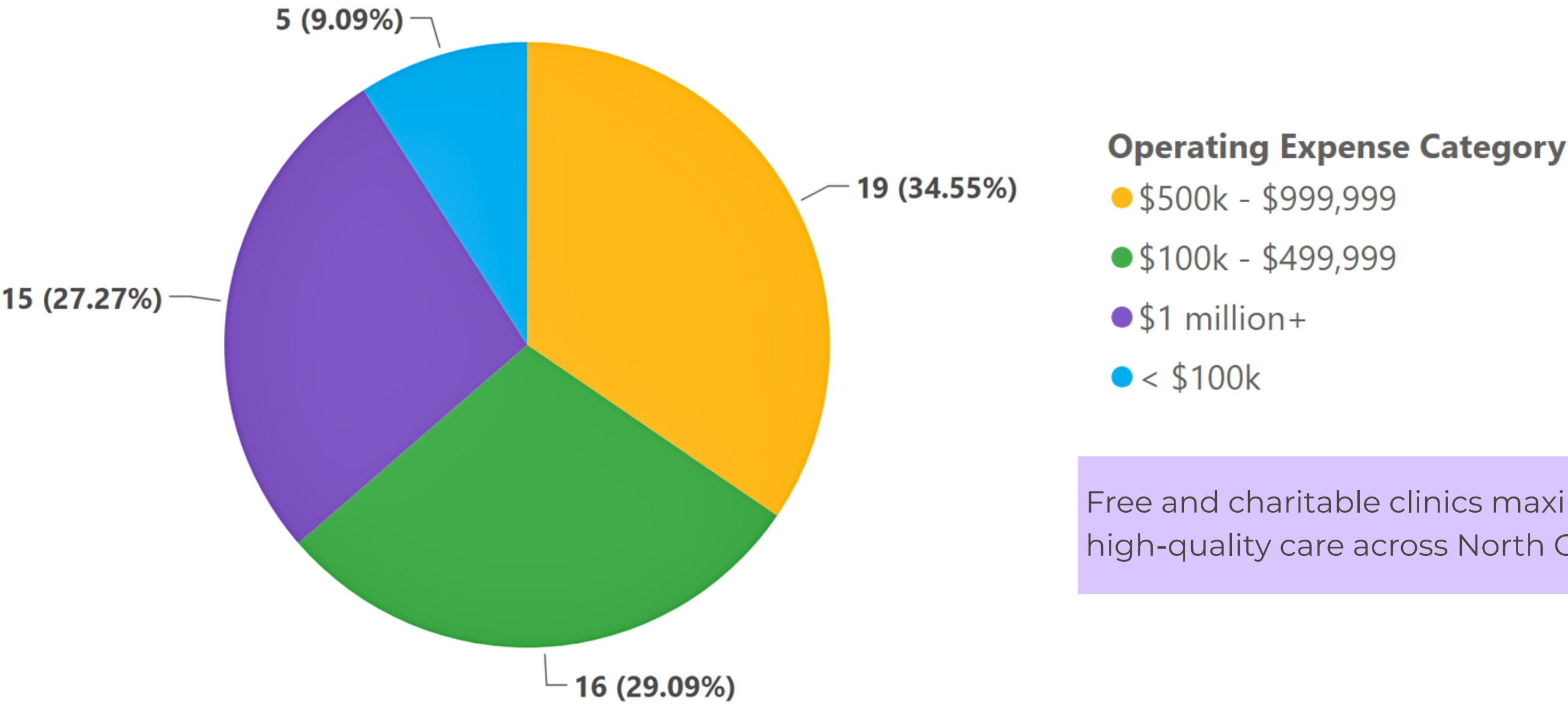
TOTAL INCOME \$53,940,112

THANK YOU to the funders, donors, and partners for investing in our member clinics to creating a healthier North Carolina.

FREE & CHARITABLE CLINICS’ VALUE OF INVESTMENT



ANNUAL OPERATING EXPENSE BY CATEGORY



Free and charitable clinics maximize resources to deliver high-quality care across North Carolina.

TOTAL VALUE OF SERVICES* \$351,845,639	OPERATING EXPENSE \$46,789,121	TOTAL VALUE OF INVESTMENT (VOI)** \$6.52 Every dollar invested in free & charitable clinics returns \$6.52 in value to patients & the community.
AVERAGE \$6,397,193	AVERAGE \$850,711	

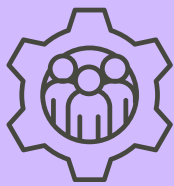
*Services arranged for and/or directly provided by NCAFCC’s member organizations and includes value of prescription medications
**Total Value of Investment (VOI) = (Total Value of Service – Operational Expense / Operational Expense)



780

Clinical & Administrative Staff

414 Full-Time | 366 Part-Time



More than 700 clinical and administrative staff members support the delivery of medical, dental, behavioral health, pharmacy, and enabling services through NCAFCC member clinics.

FULL-TIME STAFF

POSITIONS	TOTAL
Nurses, CMAs & CNAs	60
Executive Director/CEO's	40
APP's	29
Hygienists/DAs	15
Pharmacy Techs	14
Pharmacists	10
Physicians	8
Dentists	4
Other Full-Time	141

PART-TIME STAFF

POSITIONS	TOTAL
Pharmacists	30
APPs	29
Nurse, CMAs & CNAs	27
Hygienists/DAs	23
Executive Directors/CEOs	21
Physicians	17
Pharmacy Techs	15
Dentists	8
Other Part-Time	88

ADVANCED PRACTICE PROVIDERS

58

(29 FT + 29 PT)

EXECUTIVE DIRECTORS/CEO's

61

(40 FT + 21 PT)

FREE & CHARITABLE CLINIC VOLUNTEERS



Volunteers are the heart of our member clinics and make free and charitable healthcare possible.



10,545
VOLUNTEERS



246,618
VOLUNTEER HOURS

VOLUNTEERS BY ROLE

Volunteer Physicians	661
Volunteer Nurses/CMA's/CNAs	353
Volunteer Hygenists	213
Volunteer Pharmacy Techs	184
Volunteer Dentists	149
Volunteer Pharmacists	127
Volunteer APPs	8
Volunteer Executive Directors	5
Other Volunteers	8,326

TOTAL

Average Volunteers
per Reporting Clinic
195

Average Volunteer Hours
per Reporting Clinic
88

MEMBER CLINICS
REPORTING
53



More than 10,500 volunteers contributed over 246,000 hours of service in 2025, demonstrating the extraordinary community commitment that helps make free and charitable healthcare possible across North Carolina.

2025 NCAFCC ANNUAL SURVEY PARTICIPATING MEMBERS

ABCCM Medical Ministry, Asheville	Alliance Medical Ministry, Raleigh	Atrium Health Wake Forest Baptist Mobile Clinic, Winston-Salem
Blue Ridge Free Dental Clinic, Cashiers	Broad Street Clinic, Morehead City	Camino Clinic, Charlotte
Campbell University Community Clinic, Lillington	The CARE Clinic, Fayetteville	Caring Community Clinic, Jacksonville
Chatham CARES Community Pharmacy, Siler City	Community Care Clinic, Winston Salem	Community Care Clinic of Dare, Nags Head
Community Care Clinic of Highlands-Cashiers	Community Care Clinic of Rowan, Salisbury	Community Care Clinic, Franklin
Community Clinic of High Point	Community Free Clinic, Concord	Community Health Services of Union Co., Monroe
Cook Community Clinic, Huntersville	Crisis Control Ministry Pharmacy, Winston-Salem	Delivering Equal Access to Care, Winston-Salem
El Cuerpo Clinic, Wilmington	Free Clinic of Rockingham Co., Reidsville	The Free Clinics, Hendersonville
Good Samaritan Clinic, Morganton	Greater Hickory CCM Medical Ministries, Hickory	Hands of Hope Clinic, Yadkinville
HealthNet Albemarle, Elizabeth City	HealthQuest of Union Co., Monroe	HealthReach Community Clinic, Mooresville
Helping Hand Clinic, Sanford	Helping Hands Clinic of Caldwell County, Lenoir	Hope Clinic, Bayboro
Hope Community Clinic, Charlotte	Hunger & Health Coalition, Boone	John P. Murray Community Care Clinic, Albemarle
Mariam Clinic, Cary	McAdams Free Clinic, Matthews	MERCI Clinic, New Bern
Moore Free & Charitable Clinic, Southern Pines	Mustard Seed Community Health, Greensboro	NC MedAssist, Charlotte
Open Door Clinic of Alamance Co., Burlington	Pitt Co. Care Clinic, Greenville	Right Care, Raleigh
Samaritan Health Center, Durham	Senior PharmAssist, Durham	Senior Pharmacy Program, New Bern
The Shalom Project, Winston-Salem	Student Health Action Coalition, Carrboro	SVCM NeighborCare, Black Mountain
Urban Ministries Open Door Clinic, Raleigh	Vecinos, Cullowhee	Wake Smiles, Raleigh
	Wayne Action Teams for Community Health, Goldsboro	

WITH GREAT APPRECIATION

Blue Cross NC

Blue Cross and Blue Shield of North Carolina Foundation

Camber Foundation

Campbell Family Foundation

Kate B. Reynolds Charitable Trust

First Citizens Bank

NCDHHS – Office of Rural Health

NC General Assembly

Foundation for the Carolinas

NC Central University

Project Hope

The Leon Levine Foundation

The Sheri & Les Biller Family Foundation

Vanguard Charitable

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