



PATIENTS RISING INC

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PATIENTS RISING INC

 Reston, VA



 www.patientsrising.org



 (800)685-2654



 View GuideStar Profile



MISSION

Patients Rising was formed to stand up for patients. To advocate for their rights. To fight for their access to the medications they need and deserve. And to tell the truth about health care.

EIN

47-5016851

RULING YEAR

2016

IRS SUBSECTION

501(c)(3) Public Charity

FOUNDING YEAR

2015

MAIN ADDRESS

11710 Plaza America Drive
Suite 2000
Reston, VA
20190

AFFILIATION TYPE

Independent Organization

CONTACT

Janelle Wigand, Executive
Assistant
janelle@patientsrising.org

CO-FOUNDER & CEO

Terry Wilcox

BOARD CHAIR

John Kabateck

SUBJECT AREA

Health

Medical support services

NTEE Code

Alliance/Advocacy
Organizations (E01)

PROGRAMS

1. Patients Rising University

Population(s) served:People with diseases and illnesses

POPULATIONS SERVED

1. Low-income people

2. People with diseases and illnesses

COMPLIANCE

- ✓ IRS Pub 78 Verified as of March 2024
- ✓ IRS BMF 509(a) (1) as of March 12, 2024
- ✗ A-133 Audit Required/Performed?
- ✓ Conflict of Interest Policy
- ✓ Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- ✓ Board Practices Reported?
- ✓ Diversity Data Reported?
- 4 Number of Independent Board Members

Programs & Results

PROGRAMS

Source: Self-Reported by Organization,
January 2023

Patients Rising University

Population(s) Served:

People with diseases and illnesses

People with cancer

Through an online learning resource, Patients Rising University clarifies the barriers that affect patients' ability to access the health care they need when they need it. As they navigate a complex coverage and care environment, we offer pocket access to resources and best practices

CHARTING IMPACT

What is the organization aiming to accomplish?

To date, Patients Rising has directly helped more than 2,000 patients and caregivers learn how to access the care they need and advocate for themselves and their loved ones.

Our goal is to double our patients served every year, and we aim to do that through the following:

- Patients Rising Concierge: a free program that supports patients and caregivers by connecting them to free or reduced-cost services that are personalized to their needs. To get
 - Help patients and caregivers educate themselves to better navigate the healthcare system through webinars, events and personalized assistance
 - Create relevant content and share information and resources through our media outlets: The Patients Rising Podcast, Voices of Value Blog and Social Media Channels
-

What are the organization's key strategies for making this happen?

This year we will:

- Expand of the Patients Rising Concierge Program by employing robust software infrastructure and support, plus hiring additional Patient Navigators
 - Host monthly patient education focused webinars, and a fall Patient Advocacy Day on Capital Hill
 - Launch the Patients Rising Podcast
 - Launch a COVID-19 resources site for Immunocompromised Communities
-

What are the organization's capabilities for doing this?

We have expanded our team to Patient Navigators to personally handle and direct Patients Rising Concierge requests, as well as a content creation team, led by both industry leaders in healthcare advocacy, as well as patient advocates who can speak from personal experience.

What have and haven't they accomplished so far?

In 2020, we have launched Patients Rising Concierge, the Patients Rising Podcast and a COVID-19 specific website + private Facebook group dedicated to Immunocompromised Communities, and offers weekly updates + ongoing support for those who are at an increased risk for COVID-19.

Financials

FISCAL YEAR START: 01/01
FISCAL YEAR END: 12/31

FINANCIALS QUICK VIEW

Surpluses in last 5 years	2
Negative Net Assets in past 5 years	5

Financial Trends Analysis

Business Model Indicators

Created in Partnership with



Profitability	2018	2019	2020	2021	2022
Unrestricted surplus (deficit) before depreciation	-\$57,926	\$5,914	-\$182,484	\$112,070	-\$679,672
As a % of expenses	-8.1%	0.9%	-20.5%	12.4%	-43.8%
Unrestricted surplus (deficit) after depreciation	-\$57,926	\$5,914	-\$182,484	\$112,070	-\$679,672
As a % of expenses	-8.1%	0.9%	-20.5%	12.4%	-43.8%

Revenue Composition					
Total revenue (unrestricted & restricted)	\$657,697	\$663,562	\$707,707	\$993,326	\$872,251
Total revenue, % change over prior year	7.0%	0.9%	6.7%	40.4%	-12.2%
Program services revenue	0.0%	0.0%	0.2%	0.0%	0.0%
Membership dues	0.1%	0.1%	2.9%	55.4%	23.5%
Investment income	0.0%	0.0%	0.0%	0.0%	0.0%
Government grants	0.0%	0.0%	0.4%	9.8%	3.3%
All other grants and contributions	99.9%	99.9%	96.4%	34.8%	73.2%
Other revenue	0.0%	0.0%	0.0%	0.0%	0.0%

Expense Composition					
Total expenses before depreciation	\$715,623	\$657,648	\$890,191	\$903,886	\$1,551,923
Total expenses, % change over prior year	0.2%	-8.1%	35.4%	1.5%	71.7%
Personnel	20.8%	38.8%	30.2%	31.8%	26.2%
Professional Fees	53.3%	46.9%	59.1%	50.0%	57.1%
Occupancy	1.3%	1.9%	2.3%	0.8%	0.9%
Interest	0.0%	0.1%	0.1%	0.0%	0.9%
Pass-Through	0.0%	0.0%	0.0%	4.4%	0.0%
All other expenses	24.6%	12.3%	8.3%	13.0%	14.9%

Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

Full Cost Components (estimated)	2018	2019	2020	2021	2022
Total Expenses (after depreciation)	\$715,623	\$657,648	\$890,191	\$903,886	\$1,551,923
One Month of Savings	\$59,635	\$54,804	\$74,183	\$75,324	\$129,327
Debt Principal Repayment	\$28,126	\$12,500	\$21,874	\$962	\$0
Fixed Asset Additions	\$0	\$0	\$0	\$0	\$0
Total Full Costs (estimated)	\$803,384	\$724,952	\$986,248	\$980,172	\$1,681,250

Capital Structure Indicators

Liquidity					
Months of cash	0.3	0.5	0.3	1.0	0.3
Months of cash and investments	0.3	0.5	0.3	1.0	0.5
Months of estimated liquid unrestricted net assets	-0.3	-0.2	-2.6	-1.1	-5.9
Balance Sheet Composition					
Cash	\$20,843	\$26,745	\$25,248	\$74,961	\$32,815
Investments	\$0	\$0	\$0	\$0	\$30,000
Receivables	\$0	\$0	\$0	\$455,000	\$25,000
Gross land, buildings, and equipment (LBE)	\$0	\$0	\$0	\$0	\$0
Accumulated depreciation (% of LBE)	0.0%	0.0%	0.0%	0.0%	0.0%
Liabilities (as % of assets)	187.6%	144.6%	843.6%	115.6%	968.2%
Unrestricted net assets	\$0	\$0	\$0	\$0	\$0
Temporarily restricted net assets	\$0	N/A	N/A	N/A	N/A
Permanently restricted net assets	\$0	N/A	N/A	N/A	N/A
Total restricted net assets	\$0	\$0	\$0	\$0	\$0
Total net assets	-\$18,260	-\$12,346	-\$194,830	-\$82,760	-\$762,432

Key Data Checks

Material Data Errors	2018	2019	2020	2021	2022
	No	No	No	No	No

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition.Please consult the 990s of any potentially related affiliates for additional information.

- ☒ [Formulas for key metrics](#)
- ☒ ['Key Revenue & Expense Data from Form 990'](#)
- ☒ ['Key Balance Sheet Data from Form 990'](#)

Operations

Source: Self-Reported by Organization, January 2023

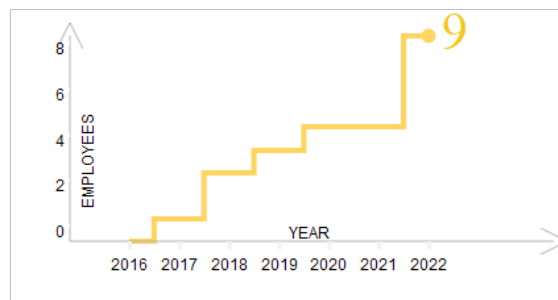
CO-FOUNDER & CEO

Terry Wilcox

[LinkedIn profile](#)

NUMBER OF EMPLOYEES

Source: IRS Form 990



BOARD CHAIR

John Kabateck

Kabateck Strategies

Term: 2019 - 2023

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2022

Name	Title	Compensation	Other	Related
Teresa Wilcox	EXECUTIVE DIRECTOR	\$178,334	\$5,350	\$41,667
John Kabateck	CHAIRMAN	\$0	\$0	\$0
Darla S Bell	DIRECTOR	\$0	\$0	\$0
Jeffrey Oldham	DIRECTOR	\$0	\$0	\$0
Jonathan Wilcox	DIRECTOR	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2021

Name	Title	Compensation	Other	Related
Teressa Wilcox	EXECUTIVE DIRECTOR	\$95,000	\$0	\$125,000
John Kabateck	CHAIRMAN	\$0	\$0	\$0
Darla S Bell	DIRECTOR	\$0	\$0	\$0
Jeffrey Oldham	DIRECTOR	\$0	\$0	\$0
Jonathan Wilcox	DIRECTOR	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2020

Name	Title	Compensation	Other	Related
Teresa Wilcox	EXECUTIVE DIRECTOR	\$95,000	\$0	\$133,750
John Kabateck	CHAIRMAN	\$0	\$0	\$0
Darla S Bell	DIRECTOR	\$0	\$0	\$0
Jeffrey Oldham	DIRECTOR	\$0	\$0	\$0
Jonathan Wilcox	DIRECTOR	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2019

Name	Title	Compensation	Other	Related
Teressa Wilcox	EXECUTIVE DIRECTOR	\$97,192	\$0	\$116,250
John Kabateck	CHAIRMAN	\$0	\$0	\$0
Larry Frazer	TREASURER	\$0	\$0	\$0
Jeffrey Oldham	DIRECTOR	\$0	\$0	\$0
Karen Shehade	DIRECTOR	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2018

Name	Title	Compensation	Other	Related
Teresa Wilcox	EXECUTIVE DIRECTOR	\$95,401	\$0	\$0
John Kabateck	CHAIRMAN	\$0	\$0	\$0
Larry Frazer	TREASURER	\$0	\$0	\$0
Jeffrey Oldham	DIRECTOR	\$0	\$0	\$0
Karen Shehade	DIRECTOR	\$0	\$0	\$0

Contractors

FISCAL YEAR 2021

Name	Address	Type of Service	Compensation
Maimon Research Llc	3750 E VIA PALOMITA, TUCSON 85718	HEALTH ECONOMIC WRITING AND RESEARCH	\$110,349

Contractors

FISCAL YEAR 2020

Name	Address	Type of Service	Compensation
Maimon Research Llc	3750 E VIA PALOMITA, TUCSON 85718	HEALTH ECONOMIC WRITING AND RESEARCH	\$110,000

Paid Preparers
FISCAL YEAR 2022

Firm Name	Firm EIN	Firm Address	Firm Phone
MITCHELL BURNS & CO PC	54-1853459	110 EAST MARKET ST 200, LEESBURG VA 20176 USA	703-777-4900

Paid Preparers
FISCAL YEAR 2021

Firm Name	Firm EIN	Firm Address	Firm Phone
MITCHELL BURNS & CO PC	541853459	110 EAST MARKET ST 200, LEESBURG VA 20176	7037774900

Paid Preparers
FISCAL YEAR 2020

Firm Name	Firm EIN	Firm Address	Firm Phone
MITCHELL & CO PC	541853459	110 EAST MARKET ST 200, LEESBURG VA 20176	7037774900

BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

BOARD ORIENTATION & EDUCATION

Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?

No

CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

No

ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

No

BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

No

BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

No

Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

The organization's leader identifies as:

Race & Ethnicity	White/Caucasian/European
Gender Identity	Female, Not transgender
Sexual Orientation	Heterosexual or Straight
Disability Status	Person without a disability

Race & Ethnicity

No data

Gender Identity

Transgender Identity

No data

Sexual Orientation

No data

Disability

No data.

Appendix

Key Documents

IRS Forms 990	2022 990
	2021 990
	2020 990
	2019 990
	2018 990
IRS Forms 990T	Not Available
Audited Financial Statements	Not Available
Key Organization Documents	Letter of Determination
	'Key Revenue & Expense Data from Form 990'
	'Key Balance Sheet Data from Form 990'

PATIENTS RISING INC

11710 Plaza America Drive Suite 2000
Reston, VA 20190

✓ Foundation Status Code: PC*

✓ Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details			<div>✓ IRS Pub 78 verified</div>
Organization name	Location	Most recent IRS Publication 78	
Patients Rising Inc.	Washington, DC	March 2024	
EIN	<u>Deductibility status description</u>	Verified with most recent Internal Revenue Bulletin	
47-5016851	A public charity (50% deductibility limitation).	March 25, 2024	

IRS Business Master File Details			IRS BMF	509(a)(1)
Organization name	Most recent IRS BMF	Reason for Non-Private Foundation Status		
PATIENTS RISING INC	March 12 2024	Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)		
EIN	IRS subsection	Ruling date		
47-5016851	This organization is a <u>501(c)(3) Public Charity</u>	06/2016		
This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.				

On September 8, 2011, the IRS issued [regulations](#) which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

[IRS Revenue Procedure 2011-33](#) allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.

-[IRS Publication 78 \(Cumulative List of Organizations\)](#) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.

-The [IRS Internal Revenue Bulletin](#) (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.

-The [IRS Business Master File](#) lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The [IRS Automatic Revocation of Exemption List](#) contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.

-The Foundation Status Code is a value derived by mapping the codes found on the [990PF filing instructions](#) to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.

-The Office of Foreign Assets Control (OFAC) [Specially Designated Nationals \(SDN\) list](#) organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.