

Community Benefit Roles & Responsibilities



Community benefit requires a multi-disciplinary team to ensure compliance with both mission and policy imperatives.

Several colleagues and departments have important roles to play in ensuring the success of community benefit efforts. Each hospital and health system is unique, and the structure of its multidisciplinary teams will vary based on size, organizational structure, and areas of responsibility. There are eight (8) skill areas to consider when establishing your community benefit team.

Community Benefit Leader

- Lead the community benefit team.
 - Oversee the community health needs assessment (CHNA) and the development of the implementation strategy (IS).
 - Coordinate community benefit planning and support its integration into the organization's strategic planning process.
 - Engage executive and board leadership in the community benefit program by keeping them informed of community needs, program successes, key issues and collaborative efforts.
 - Oversee implementation of community benefit programs and activities. Manage community benefit operations, such as staff hiring and training, budgeting, and maintaining documentation that demonstrates community need.
 - Be responsible for evaluating the organization's overall approach and strategy, as well as evaluating individual programs.
 - Collaborate with finance staff to budget for community benefit activities, track programs and costs, and assist in the preparation of the IRS Form 990 Schedule H.
 - Keep documentation substantiating the expense reported for community benefit categories.
 - Partner with communications staff to prepare reports and share the community benefit story.
 - Work with population health management staff to share information about community health needs, community benefit programs and relationships in the community that could enhance the organization's population health management efforts.
- Build and maintain relationships with public health departments and other community organizations to support strategic partnerships and shared health goals.

Revenue cycle

- Track, maintain and report information about community benefit costs related to Financial Assistance/Charity Care.
- Develop and oversee the implementation of financial assistance, and billing and collection policies and procedures, to ensure compliance with Section 501(r) requirements

Finance and Tax

- Be part of the community benefit team.
- Include the community benefit budget in the organization's overall budget.
- Advise on the budget implications of community benefit proposals and plans.
- Track, maintain and report information about community benefit costs.
- Ensure financial information in IRS Form 990 Schedule H, and other community benefit reports is complete, accurate and consistent.
- Maintain a cost accounting system and provide and review necessary data.
- Help assess the community benefit budget by comparing the value of community benefits to the organization's tax benefits.
- Develop long-range strategic financial plans that include community benefit targets.

Communications

- Be part of the community benefit team.
- Coordinate efforts to tell the community benefit story.
- Contribute to community assessment activities, including the development and use of tools, such as surveys, focus groups and interviews.

- Coordinate the development of community benefit, community health impact, and related reports.
- Use print, online and social media to share information about community benefit and the CHNA/IS with the public.
- Identify and pursue opportunities to proactively tell the community benefit story.
- Identify a point person for media inquiries related to Schedule H and other community benefit issues, and collaborate with the community benefit team to develop appropriate responses.
- Maintain a community benefit website that is compliant with 501(r) requirements for posting.
- Hold key staff accountable for participation in community benefit.
- Provide adequate financial and operational resources for the community benefit program.
- Report to the governing body on community needs and the organization's response to those needs.
- Ensure that community benefit initiatives go beyond reactive services (e.g., financial assistance, means-tested programs) to include proactive efforts (e.g., outreach to low-income persons, illness and injury prevention, addressing root causes of health issues).
- Be accountable for setting community benefit goals and objectives.
- Ensure that financial assistance and billing/collection policies meet government requirements and are followed.
- Require the same level of excellence and oversight of community benefit as other key functions of the organization.
- Be an advocate for community benefit, and the people served through community benefit programs, inside and outside of the organization.

Strategic Planners/Data Analysts

- Be part of the community benefit team.
- Contribute statistical data and other information to the CHNA, including the identification of the area served by the hospital(s).
- Incorporate community assessment findings into the organization's strategic and operational plans.
- Understand local, regional and national public health priorities.
- Recommend priorities for community benefit action based on the organization's goals and strategic directions.
- Include community benefit goals, objectives and strategies in the organization's plans or integrate community benefit into the organization's goals, objectives and strategies.

Legal, Compliance and Audit Control

- Monitor government requirements related to community benefit and tax exemption.
- Work with the community benefit leader and finance leader to ensure compliance with requirements.
- Monitor compliance and conduct mock audits.

CEO and Administration

- Appoint qualified personnel to lead and support community benefit operations.
- Ensure that all entities affiliated with the organization share community benefit goals and related policies, such as those for financial assistance and billing and collection.

Board

- Develop a community benefit committee of the board or make oversight of community benefit an ongoing responsibility of the board.
- Contribute information to the CHNA.
- Review the community health needs assessment results and advise on priorities for community benefit activities.
- Approve financial assistance and billing and collection policies.
- Approve the CHNA, implementation strategy, and other community benefit reports.
- Ensure that community benefit efforts align with community needs identified through assessment and other means.
- Visit or participate in a community benefit activity.
- Represent the community's interest to the organization, in general and specifically, when advising on priorities for community benefit activities.
- Ensure the organization is complying with government requirements related to community benefit and tax exemption.

About The Catholic Health Association of the United States (CHA)

For over 35 years, CHA has been the leading source of information and tools for planning and reporting hospital community benefit. In 2008, CHA's accounting system for reporting community benefit was used in the development of the IRS Form 990 Schedule H.

CHA represents more than 650 hospitals and 1,600 long-term care and other health facilities in all fifty states. Our hospitals were established to address health needs in their communities and that tradition continues today. Catholic hospitals are a critical source of care and services in their communities. This includes community-based services that address significant health and health-related needs reported as community benefit.

Note: The information provided in this document does not constitute legal or tax advice. The information is provided for informational/educational purposes only. Please consult with counsel regarding your organization's particular circumstances.