



“I’m New to Community Benefit; Where Do I Start?”

Our organizations were established not for economic opportunity but to address the need for health services in our communities. Our facilities were born out of community need, a tradition that continues today.

—Sr. Carol Keehan, DC, president and CEO,
Catholic Health Association

The CEO walked into my office yesterday and said, ‘I need you to take over responsibility for community benefit and determine what else we should be doing.’ As she left, I wondered if this was my lucky day or a case of being in the wrong place at the wrong time.

—Community benefit champion

Historically, Catholic and other not-for-profit health care providers have been reaching out to serve the poor and the underserved through a broad range of activities. In June 2006, the Catholic Health Association (CHA) built on earlier work in social accountability and released *A Guide for Planning and Reporting Community Benefit*. The guide, published in cooperation with VHA, Inc, describes a process for ensuring that these varied activities are part of a well-planned, well-managed, and well-evaluated community benefit program.

Hospitals that are just starting to develop systematic community benefit programs often ask, “Where do we start?”

If you, like the community benefit champion quoted above, have suddenly been handed “community benefit” by your CEO or someone else in the organization, you may find knowing where to begin overwhelming. As you start reading about your assignment and discussing it with others, the reality of what you have been asked to do will begin to set in. You will quickly discover that community benefit is a complex program—it is not simply counting numbers. It will require a team approach and continual communication with both your own colleagues and members of the community.

In the long run, we hope that you will also discover that community benefit is a rewarding experience—and that, indeed, it was your lucky day when you were asked to take charge of it.

But that’s in the long run. For now, let’s figure out how to begin.

No. 1: BUILD YOUR UNDERSTANDING OF COMMUNITY BENEFIT

Frequently, a health care organization’s desire to tell its community benefit *story* is the catalyst in sharpening a focus on its community benefit *program*. As you learn more about community benefit, you will realize that collecting the data needed to tell the story is just one component of the program. In reality, community benefit is a planned, managed, and measured approach to meeting identified community needs. It is a strategic program that uses a process to deliver a host of activities and services that “provide treatment and/or promote health and healing that address community need.”¹

As the newly designated community benefit champion in your organization, you should learn as much as you can about community benefit. How is it defined? Why is it imperative that your organization have a community benefit program? What program components do you need to put



BY PATSY MATHENY

Ms. Matheny is a community benefit consultant who works with individual hospitals, health systems, and regional and national organizations.

in place? Does anyone *else* in your organization know what community benefit is all about?

The best way to begin building your understanding of the program is by reading *A Guide for Planning and Reporting Community Benefit*. The guide provides the historical background about community benefit, describes the six steps required for developing and implementing a comprehensive program, explains accounting principles, and gives recommendations concerning what to count as a community benefit.

You can order a copy of the guide from the CHA community benefit website (www.chausa.org/pub/mainnav/ourcommitments/communitybenefits). The CHA website (and those of other organizations) also offers examples of PowerPoint presentations; community benefit plans and reports; descriptions of community benefit activities; job descriptions; and public policy documents, articles, and job descriptions. Take a few minutes to familiarize yourself with the available resources (see **Box**).

No. 2: GET A TEAM TOGETHER

Serving as your organization's community benefit champion can be a lonely job, and you can't do it alone. If your organization is new to community benefit, it won't take long for you to realize that most of your colleagues don't understand the program—so the work will rest on your shoulders. (Ideally, 100 percent of your time will be committed to community benefit. At a minimum, 50 percent of your time is needed to fully grow and sustain the program.) You will soon see that you need help.

Community Benefit Resources

For publicly available information about community benefit, go to:

- CHA's community benefit website: www.chausa.org/community-benefit
- Lyon Software, home of CBISA (Community Benefit Inventory for Social Accountability) software: www.lyonsoftware.com
- Association for Community Health Improvement, a membership group for community health professionals: www.communityhlth.org/communityhlth_app/index
- Advancing the State of the Art in Community Benefit, a demonstration project sponsored by the Public Health Institute: www.asach.org

Forming a team, commonly called a "community benefit steering committee," will enable you to pull together needed skills to get the work done and give you a support system. Who should be on the team? Start with a core of representatives from your organization's mission, community health, finance, and public relations departments. Later, you can add more team members—and create special-purpose subcommittees to carry out the steering committee's work plan.

As you progress, you may want to form a separate board of trustees' community benefit committee to provide oversight. You should also consider adding community representatives to existing committees or forming a separate community advisory committee.

No. 3: FOCUS INITIALLY ON TWO SIMULTANEOUS TASKS

Jump in with both feet. Your steering committee should start with two simultaneous tasks that, together, will provide the groundwork for building a comprehensive, systemwide community benefit program. One is to execute an internal communication plan to increase awareness and knowledge about community benefit. The second is to conduct an inventory of current community benefit programs.

Educate Internal Staff To build organizational commitment, it is first necessary to educate all employees about what community benefit *is* and why it is relevant to their jobs and to the organization's mission. Eventually, you will be asking staff members to give their time and other resources to community benefit activities, to give you data, and to be informed ambassadors in the community, capable of telling the organization's community benefit story. The CHA website has two PowerPoint presentations that provide an overview of community benefits, one for leaders and one for frontline staff. Tap into the skills of your steering committee to execute an ongoing internal communications plan.

It is also valuable to conduct one-on-one interviews with senior leaders, board members, finance managers, and strategic-planning and quality-improvement staff. Ask them what they know about community benefit, give them information to increase their knowledge, and explain specifically how community benefit can affect the organization's strategic direction. Finally, suggest ways that they can be involved.

Inventory Current Community Benefit Activities What are your organization's current community benefit activities? Taking an inventory will help you

appreciate the organization's current level of commitment and understanding of community benefit. The inventory can also result in:

- A raised awareness of community benefit within the organization.

- Examples to use in discussing community benefit internally.

- Stories and data that can be used in a community benefit report.

- A baseline of programs that can be used to determine whether the organization is a good steward of resources. Are the current programs the ones needed to meet identified community needs? Are the current programs demonstrating impact? Are the current programs being implemented efficiently and effectively?

- Community benefits information for your IRS 990 tax form. CHA has on its website a community-benefit template that can be attached to the tax form.

"How Do I Know What Counts?" At this point, you might be asking yourself: How do I know what counts? How do I go about counting? Chapters 3 and 4 in *A Guide for Planning and Reporting Community Benefit* discuss criteria for determining whether an activity is a community benefit. They also describe standardized methods and policies for how to quantify community benefit activities.

Reference I of the guide (p. 109) offers examples of activities that fall under each of seven categories (see www.chausa.org/nr/rdonlyres/68057062-b902-420d-bb04-c5b1597e64bb/0/cbcategories_hospitals.pdf).

Are you puzzled whether to count a particular activity? Through its website, CHA offers a resource called the "What Counts E-Mail Hotline." You can download a form and submit your question to CHA for review by a group of seasoned professionals.

"How Do I Collect the Data?" You may be wondering: How do I collect the data? The internal education that you are simultaneously conducting with staff members will aid the challenging task of taking an inventory. The better that staff members understand what community benefit is and why it is important to the organization, the more likely they will be to justify the time

required to identify and report activities. Submitting data can be rewarded by giving recognition to staff who participate in or report community benefit activities.

Collecting the data can either be done manually or online. An excellent tool to use in collecting and reporting such data is Lyon Software's CBISA Software. Used by more than 1,000 organizations, CBISA employs the CHA/VHA community benefit categories, which makes it easy for organizations to collect standardized data from all system entities. CBISA generates 60 reports that can package the data to help target community benefit messages to varied audiences. Check out CBISA at www.lyonsoftware.com.

No. 4: START THINKING STRATEGICALLY ABOUT COMMUNITY BENEFIT

Remember the law of physics: Once you start the ball rolling, it picks up speed and moves in the same direction. As you move through the beginning steps of community benefit work, keep your eye on the future. What will it take to make community benefit a proactive program—a program that is a planned, managed, and measured approach to meeting community needs?

As you review the steps described in the guide, start developing a work plan that further strategically aligns community benefit within your organization. The guide will give you tips on:

- Gaining solid organizational commitment
- Refining your infrastructure
- Developing and implementing a community benefit plan that is linked with the organization's strategic direction
- Evaluating your overall community benefit program and each community benefit activity
- Reporting creditable, consistent community benefit data and stories

As the saying goes, "the hardest part of any job is getting started." Congratulations on beginning the journey to a rewarding experience. ■

NOTE

1. Catholic Health Association, *A Guide for Planning and Reporting Community Benefit*, St. Louis, 2006, p. ix.

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