

*You Have  
a Story  
to Tell ...  
We Can  
Help You  
Tell It.*



Small or Rural Hospital  
IRS 990 Schedule H  
AHA Teleconference December 9, 2008 <sup>1</sup>



## MHA Background

- 1997 MHA began voluntary statewide Community Benefit data collection effort
- 2004 other state associations contacted us to assist them with data collection



## MHA Background

- Members recognized collecting data once a year drastically underreported data
- Members asked for easy to use, low cost, high quality product to gather data in real time to increase accuracy
- Strong focus on access to education and training



## Michigan Story

- Assist hospital understand & report the most accurate Community Benefit information
- Produce annual CB report
  - 132 Michigan Hospitals
    - 65 Rural hospitals
    - 67 Urban hospitals
- Produced movie outlining CB programs offered throughout MI  
[www.mha.org/mha\\_app/reports/communitybenefit/cbvideo.jsp](http://www.mha.org/mha_app/reports/communitybenefit/cbvideo.jsp)



Small or  
Rural  
Hospital  
Unique  
Challenges

- Largest employer in community
- Community has high expectations from hospitals
- Fewer staff to help with project
- Staff responsible for many cost centers/departments
- Funding for technology often limited



Why create a system to capture CB data?

- More accurate data collected
- Ability to provide routine updates to hospital staff & board
- Creates awareness of CB in organization
- Demonstrates organizations commitment to project
- Spread labor resource over the year
- Use fewer resources when clear expectation are defined
- Reduce duplication of efforts



Best system  
for  
organization

- Many different methods of implementing a CB program into an organization
- Create a system that fits the culture of your organization
  - “Gate keeper” method
  - Entry of data by multiple users
  - Other



Develop a  
Community  
Benefit  
Team

- Support from executive office
- Finance/accounting
- Community education
- Marketing
- Planning
- Public relations
- Hospital foundation
- Department heads
- IT
- Other





## Project Coordinator Suggestions

- Engage your CEO's constant support
  - Send note/memo from CEO at beginning of fiscal year
  - Send follow-up notes throughout year from the CEO and CFO
- Get CFO or other finance staff on board to calculate indirect cost factor, financials and year end review



## Project Coordinator Suggestions

- Enlist assistance from department heads
  - Provide abbreviated CB definitions
  - Ask for info monthly or quarterly
  - Have CB as standing item at monthly/annual meetings
  - Share hospitals stories at meetings
- Keep track of who has promised you information



## Project Coordinator Suggestions

- Use the Event Tracker Form to gather information
- Develop a reminder list of “big” CB providers in your organization
- Follow-up and train those that are not intuitive as providers of CB (lab, housekeeping, dietary)



## Project Coordinator Suggestions

- Provide regular written reminders to all staff throughout the collection cycle and the year
  - In-service programs
  - Facility wide department competitions to encourage data submission
  - Paycheck stuffers
  - Develop an annual community benefit training session for hospital staff



## Project Coordinator Suggestions

- While walking in hospital, look at:
  - Posters
  - Fliers
  - Newsletters
  - Other promotional materials
- Review current/past press releases
- Review your Web site



## Project Coordinator Suggestions

- What happens at year end is important
  - Share report with staff
  - Send thank you notes to all submitters
  - Celebrate the organization's accomplishments (breakfast, prize drawings, etc.)
  - Host thank you events in various departments
  - Showcase (poster presentation) one program each week for month during hospital week (May) in lobby of hospital



## Collect Other Benefits

- Some community benefit is not easily counted or it may provide value but fall outside the definition of CB
- Best reported locally by your organization in annual report
  - Activities that provide community benefit but make minimal profit or are break even
  - Programs provided by hospital volunteers or hospital staff donating own time
  - Collaborative work by the organization



## Value of Collecting Data in Tracker

- Defined programs & services for consistent reporting through hospital
- Ability to add custom data fields to collect information specific to your needs
- Easy to use, Web-based software
- Robust reporting with filters (reporting by department, user, program or service)
- Data can be exported





## IRS 990 Schedule H

- If you enter data routinely, most work complete at end of year
- Dedicated section to year end financial data
- Ability to generate worksheets and reports to serve as equivalent documentation for IRS



Once you  
have your  
data

- It is the hospital's responsibility to be accountable to the community
  - Use information/report in your community
  - Media, business, opinion leaders
  - Use with legislature and congress
  - Specific instances (CEO comp., billing and collections)
  - Chamber of Commerce & Rotary meetings
  - Share results with hospital staff



## Last Thoughts

- Challenges every day to hospital credibility and accountability
- Create a systematic way to gather data as events occur
- Be conservative but as thorough as you can
- CEO involvement & commitment is a must
- You will not capture it all but you will get a lot!
- Make this a pride project -- Tell your hospitals story!
- You can do this!



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