Community Health Needs Assessment & Community Benefit Reporting

Trainings, Tools, Templates, and Exercises

Community Benefit Reporting (CBR) Tool

RHPI Project has supported the creation of instructional power points and associated tools to assist hospitals to create their own Community Benefit Report. This document provides an easy-to-use roadmap to help you to navigate through this rich and extensive resource opportunity. Each individual resource can be accessed as needed by clicking on its title. You may access the entire page of options at **https://secure.ruralcenter.org/help-registration/content/community-benefit-reporting-tool**.

The first list below includes a four-part Power Point series that presents information for different aspects of creating a Community Benefit Report. The title of each is self-explanatory of the content. Next to each title you will find the exercises or tools associated with that Power Point. Links for each exercise can be found in this document. For your convenience, a description of each exercise, tool, worksheet, or template is also included. This will make it easier to go immediately to an exercise that meets your needs.

Community Benefit Training Power Points

Part 1 – Introduction to Community Benefits, Organizing, Planning and Identifying (Exercise A)

Part 2 – Identifying (Exercises B – G)

Part 3 – Tracking and Reporting (Templates 1 – 4)

Part 4 -- IRS 990 Reporting

Community Benefit Reporting Templates & Exercises

A. Community Health Improvement Services:

A1. Community Health Education   Assists hospitals to identify educational activities including lectures, presentations, and group programs and activities, not including clinical or diagnostic.

A2. Community-Based Clinical Services Assists hospitals to identify services and screenings provided on a one-time basis or special event in community to meet an identified community need or to improve community health.

A3. Health Care Support Services Assists hospitals to identify services provided by hospital to increase access of care to individuals, increase quality of care to individuals, and focus on persons living in poverty or other vulnerable populations.

B. Health Professions Education:

These tools help a hospital identify resources they have invested to help prepare future health care professionals. Four tools cover different types of professionals:

B1. Physicians and Medical Students

B2. Nurses and Nursing Students

B3. Other Health Professions Education

B4. Scholarships and Funding for Professions Education

C. Subsidized Health Services:

These tools inventory clinical services provided despite a financial loss AND which generate financial losses so significant that negative margins remain after removing the effects of charity care, Medicaid shortfalls and bad debt. Seven tools assist a hospital to identify services provided in different clinical areas:

C0. Subsidized Health Services

C1. Emergency and Trauma Services

C3. Hospital Outpatient Services

C5. Women's and Children's Services

C7. Continuing Care

C8. Behavioral Health Services

C9. Palliative Care

D. Research:

Two tools assist a hospital to quantify benefits based on research and includes clinical and community health research. May include grant-funded or government studies on health care delivery and studies funded by the hospital itself. Include only research that is shared with others as opposed to being used only internally by either the facility or funder.

[D1. Clinical Research](#)

[D2. Community Health Research](#)

E. Cash and In-Kind Contributions:

Three tools are available to assist a hospital to track funds and in-kind services donated to individuals not affiliated with the hospital, community groups, or other not-for-profit organizations.

[E1. Cash Donations](#)

[E2. Grants](#)

[E3. In-Kind Donations](#)

F. Community Building Activities:

Eight tools are provided to assist hospitals to report benefits that support community assets by offering the expertise and resources of the health care organization and focus on root causes of health problems: poverty, homelessness, and environmental problems. Their titles are self explanatory of the included content.

[F1. Physical Improvements and Housing](#)

[F2. Economic Development](#)

[F3. Community Support](#)

[F4. Environmental Improvements](#)

[F5. Leadership Development](#)

[F6. Coalition Building](#)

[F7. Advocacy for Coalition](#)

[F8. Workforce Development](#)

G. Community Benefit Operations Activities:

The following three tools may be used to assist the hospital in tracking the costs involved with the community benefit activities.

G1. Assigned Staff   G1 includes staff costs for managing or overseeing community benefit program activities that are not included in other categories of community services and staff costs for internal tracking and reporting community benefit.

G2. Community Health Needs Assessment   G2 tracks costs for community health needs assessment and other community assessments, such as a youth asset survey

G3. Other Resources   G3 includes costs associated with community benefit evaluation, cost of fundraising for hospital-sponsored community benefit programs including grant writing, grant writing and other fundraising costs related to equipment used for, costs associated with developing a community benefit plan, conducting community forums, and reporting community benefit.

Community Benefit Reporting Templates

1. Community Benefit Activity Report   This form is to be used in reporting programs or services that a department provides for the benefit of the community. The program or service must address a community need and the purpose is to benefit the community rather than the organization

2. Community Benefit Planning Worksheet   This template assists an organization to plan for the implementation of a program and includes identification of targeted populations, resources needed, expected outcomes, and action plan.

3. Policies Checklist – Financial Assistance   This template inventories an organization's status and presence of policies regarding financial assistance.

4. Policies Checklist – Billing and Collections   This template inventories an organization's status and presence of policies regarding non-payment and collections.

Community Health Needs Assessments (CHNA) Trainings

Webinar Playbacks

Community Health Needs Assessment – IRS Proposed Rule

Justifying Your Hospital's Tax Exempt Status

Performance Management Group (PMG) Call Playback with Union General Hospital and Magee General Hospital share lessons learned From CHNA and CBR Projects.

PMG Call Agenda

To request a playback of the *IRS Compliance: Community Benefits Reporting* PMG call, click on *"Register"*, which is located at the bottom of the page.

More information on CHNA is available from the Flex Monitoring Team. Refer to the [*A Community Benefit Reporting Toolkit for Critical Access Hospitals.*](#)