

BoardBrief

Prepared for Colorado Hospital Association Trustees

Speaking Up for Your Hospital **Advocacy Basics for Trustees**

Trustees often become so consumed with organizational issues and challenges that they lose sight of the need to consistently and forcefully connect in meaningful ways with their communities. With growing scrutiny of the health care field in general, and of the “community benefit” provided by hospitals specifically, hospital boards have a unique opportunity to ensure that their organizations consistently engage in meaningful ways with a broad range of community stakeholders.

Hospitals contribute in many significant ways to their communities, both clinically and non-clinically. As a trustee, do you know all the ways your hospital contributes to the community? Does the board support those activities, seek out additional opportunities to impact the community, and understand and communicate the results and impact the hospital has?

For some boards, the first step may be as simple as identifying or re-defining the hospital’s commitment to the community. Next, the board needs to understand what is already being done, what can be done and what more should be done. Finally, and very importantly, the hospital should communicate to key stakeholders and the general public what it is doing to benefit the community. Trustees have an opportunity and an obligation to impact the negative-to-positive ratio of stories and statistics about health care heard by federal and state legislators, the media, and individuals in their own communities.

The Business Case for Community Health Initiatives

It’s simple: strengthening community relationships and implementing initiatives to improve the community’s health is the right thing to do for hospitals’ patients, families and communities. In addition to helping hospitals fulfill their community-focused missions and visions, community health

initiatives provide several significant business-strengthening benefits, including:

- Credibility and leverage in representation and advocacy;
- The potential to increase market share;
- Development of allies to address common challenges;
- Creation of new partnership opportunities;
- Foundation fundraising;
- Strengthened support and public trust for the hospital and its efforts;
- Increased awareness of hospital challenges and understanding of the hospital’s commitment to addressing community needs;
- Strengthened employee morale and sense of purpose; and
- Preservation of not-for-profit hospitals’ tax-exempt status as the community benefit provided by hospitals and health systems becomes clear and measurable.

A big part of what’s right about health care in America today is that many hospitals are making significant community contributions already. The problem is their stories aren’t being sufficiently told; so the local community, the media and lawmakers don’t know about the valuable community health initiatives already underway. If your organization is already

sharing stories of its community contributions, look for opportunities to strengthen community health initiatives to both build community relationships and take advantage of the business benefits. If community health initiatives and community benefit activities are not high on the board's radar screen, they should be.

The Need for Trustee Leadership and Involvement

Hospital trustees are trusted leaders in their communities. They also have a unique and powerful role as key communicators of the benefit provided by their hospital. Because they are volunteers, they are seen as unbiased, impartial protectors and stewards of the hospital's cherished mission, values and vision. This role is commonly referred to as "advocacy," and is a key part of trustees' responsibilities.

Despite its critical importance, the advocacy component of trustees' jobs isn't always prominently discussed. Advocacy is an opportunity to bring valuable information to elected officials that they otherwise would not have. Legislators have to make decisions about a broad range of issues, many of which they aren't intimately familiar with. Trustees can provide legislators and their staffs with the perspective and facts they need to make educated decisions about issues that have a significant impact on local health care and the local economy. When trustees form long-term relationships with elected officials, the legislators look to them for valuable insight and information on issues for which they may have limited knowledge or first-hand experience.^{1,2}

Trustees' Advocacy Carries a Powerful Message

Trustees provide a fresh perspective to supplement the efforts of hospital CEOs, hospital associations and other membership organizations that conduct advocacy efforts on behalf of the hospital. Trustees' voluntary commitment to the hospital and to the community makes their message powerful, and carries great weight because it doesn't have the real or perceived "bias" associated with the potential personal benefits that may be derived from hospital CEOs or lobbyists.

Experts agree that in many cases trustees are the most effective advocates for their hospital, largely because of their volunteer status. Dan Sisto, former president of the Healthcare Association of New York State (HANYS), says that "trustees have more influence with legislators because they are voluntary board members and community leaders... Politicians pay

attention to trustees because a trustee's livelihood does not depend on a hospital's financials."¹ That opinion was echoed by Joe DaSilva, previous Senior Vice President for Advocacy and Education for the Texas Hospital Association in a *Trustee Magazine* article, where he explained that "the trustees are the most important component of the grassroots effort because they don't have any personal gains other than the gains that may be passed on to the community by their success... They have stature within the community that garners respect, they bring business acumen to the discussion, and they have friendships with elected officials."³ In another *Trustee Magazine* article Barbara Lorschach, Senior Vice President, Member Relations for the American Hospital Association, reiterated the importance of trustee advocacy when she explained that "trustees are personally willing to commit their time and energy, and that says a lot about how important the hospital is."⁴

The board is ultimately responsible for ensuring that the hospital has the resources it needs to carry out its mission, and effective advocacy plays a critical role. At CHRISTUS Santa Rosa Health Care in San Antonio, TX, two staff members work solely on advocacy issues. While not all organizations are large enough to warrant this level of staff dedication, CHRISTUS Santa Rosa's investment in staffing and funding for advocacy activities demonstrates how important the board believes advocacy is. At CHRISTUS Santa Rosa, the advocacy staff provides information to the board so they are well-prepared for advocacy opportunities, such as representing the organization in civic and government settings. And as members of the community, trustees attend civic meetings and other functions along with the hospital staff, which helps them to have a better understanding of community issues and opinions and also provides opportunities for them to communicate the benefit that the hospital provides.⁵

While not all hospitals will take the same approach as CHRISTUS Santa Rosa, every hospital should look for ways to maximize trustees' credibility in ways that the hospital staff cannot do alone. Opportunities include:

- **Communicate the Impact of Potential Decisions.** Trustees can help communicate the impact of budget cuts and other potential legislation on their hospitals and communities in personal ways, such as the impact on patient care on an individual, personalized level, or the impact on the hospital's workforce or the local economy.
- **Talk about Community Benefit, Don't Just Ask for More Reimbursement.** As investigations and lawsuits have

demonstrated, some lawmakers are becoming increasingly skeptical about hospitals' true "financial needs" and whether they are deserving of their tax-exempt status. Lawmakers are increasingly interested in the amount of charity care hospitals provide, the community benefits they offer, and the ways in which they handle patient billing and collections. According to Joe DaSilva, "We have lost some opportunities by focusing so much on 'Just give us more money.'" Trustees need to communicate a deeper message about what's right about health care and opportunities to do even more, rather than simply focusing on needing more money.

- **Look for Opportunities to Tell Stories.** People tend to take for granted the great work that hospitals do, and they need to be reminded. Lawmakers, key stakeholders, and the general public need to hear stories about what their local hospitals are doing to save patient lives, improve individuals' quality of life, contribute to new research and development, and make a difference in the health of their communities. Without hospitals taking the initiative to ensure these stories are heard, the public may only hear the more negative stories about hospitals and health care that tend to dominate the news and personal conversations.
- **Be Engaged.** Boards need to be engaged and knowledgeable about their hospital's community benefit activities and charity care so they can effectively communicate it with legislators and key stakeholders. The more trustees are engaged, the more they will be able to communicate their hospital's story on a personal level, sharing individual stories and talking from personal experience.³

Trustee Advocacy Provides Stability

Successful advocacy is highly dependent on relationships. It involves building ongoing relationships that include regular interactions and communications, not just seeking out a lawmaker or community representative when the hospital wants something. When forming deep and long-term relationships in the community, an experienced trustee with a personal interest in the community is the best voice to form lasting partnerships that can benefit the hospital.

As trustees work to form long-term relationships, they should look for opportunities with politicians at every level - city,

county, state and federal. In many cases, forming relationships with a lawmaker's legislative staff can be just as important as forming relationships with lawmakers directly, since most rely on their staffs to provide them with research, information and perspective on issues.

One way to form relationships with state and federal legislators is to take advantage of opportunities that already exist. When possible, seek out legislators or their staff members at social gatherings or civic meetings to begin forming relationships. Host legislator visits to your hospital and take them into the community to see the community benefit work you're doing outside the hospital.

Many state hospital associations often hold advocacy days and offer support for trustees who want to visit their state capitals to meet with legislators and key decision-makers. In addition, the American Hospital Association organizes trips to Capitol Hill during their annual meeting every spring.²

Grassroots Advocacy: Using Community Connections to Build Community Health and Strengthen Public Trust

Successful advocacy is about more than establishing relationships with legislators. One of the most important roles of the board is to maintain strong and vibrant community relationships that build community understanding and loyalty to the hospital. Trustees play a vital role in securing strong public perceptions of the hospital and raising its profile as a premier community financial, health care and social services asset.

As a part of hospitals' grassroots advocacy efforts, every community has a broad range of key constituencies or stakeholders who should be communicated with and influenced by the hospital. The hospital board is the ideal conduit between the hospital and these community groups, including:

- Community spokespersons or health advocates;
- Purchasers of health care;
- Insurers and other payers;
- Patients and families;
- Legislative and regulatory bodies;

Key Trustee Roles in Legislative and Community Advocacy

- **Advocate:** Taking the hospital’s message to legislators through lobbying or delivering testimony at hearings, representing the community’s interests in board decision-making.
- **Educator:** Speaking on issues facing the hospital at schools or civic groups; appearing on local television or radio shows to discuss health care, and highlighting what the organization is doing to contribute to the community’s health well-being.
- **Conduit:** Participating in public forums to discuss issues facing the hospital, share what the hospital is doing in the community, and learn about community opinions or health care needs.
- **Ambassador:** Representing the hospital at important community social gatherings.
- **Host:** Presiding over visits of legislators, senior citizens, or key business leaders to the hospital to help them learn about available services and to hear about their interests or needs.

- The news media;
- Civic groups, agencies and organizations;
- Religious leaders;
- Business owners; and
- Educational institutions.

This type of grassroots networking is an opportunity to leverage already existing relationships. For example, trustees can educate the community through one-on-one conversations and presentations before local organizations

such as Kiwanis and Rotary clubs. These relationships should include two-way communication – trustees have an opportunity to share what the hospital is doing well and the challenges it faces, but they should also seek out community members’ opinions and perspectives and take that information back to the board and hospital leadership.¹

Getting Started: Strengthening Trustees’ Advocacy Role

Successful hospital advocacy in today’s environment requires trustees’ commitment and involvement to share the “hospital’s story” and strengthen their relationships with community members, opinion leaders and elected officials. Some specific steps trustees can take include:^{1,6}

- If you haven’t already, talk with the CEO and find out how the organization is engaging the community and what role trustees can play;
- Talk about the hospital and health care in general with family, friends and colleagues, noting the many contributions the organization makes to the health, economy and quality of life in the community;
- Ask to do a short presentation about the hospital that involves active listening at a meeting of one of the clubs or organizations to which you belong;
- Make sure that trustees “talk up” the hospital and solicit opinions about what is happening in health care at the local level, at meetings, parties, and other events they attend; and

Five Steps to Bolster Your Advocacy Effectiveness

Whether the board already has a trustee advocacy approach in place or is starting from scratch, the following five recommendations from CHRISTUS Santa Rosa Health Care suggest ways the board can either begin or strengthen its advocacy effectiveness.

1. **Discover existing relationships.** Find out where relationships exist between the hospital, members of Congress and state/local government officials.
2. **Find interested participants.** Identify individuals who are willing to become public policy advocates.
3. **Participate in advocacy initiatives.** Trustees typically write letters, make phone calls and visit lawmakers to present policy facts and information about the hospital.
4. **Contact legislators.** Develop relationships with legislators before the hospital needs them, in order to be ready to contact them on advocacy issues. Use relationship-building time as an opportunity to tell the hospital’s “story” without asking for anything in return.
5. **Develop an advocacy profile.** Evaluate existing relationships with senators and representatives and develop methods for building and strengthening these relationships.

Source: *Beeler, Don A. Be an Advocate for Your Community. Trustee Magazine. November 2008.*

- Review the American Hospital Association’s Community Connections toolkit entitled “Telling the Hospital Story: Going Beyond Schedule H,” which includes tips and questions for a communications strategy to bolster the hospital’s public messages, a sample community benefit report and presentation, and a community benefit report worksheet to guide trustees’ thinking and help summarize the ways in which the hospital helps the community.

Avenues for Building Community Centeredness

In addition to building and sustaining partnerships, there are a variety of avenues by which hospital trustees and leaders can gain a greater understanding of the community’s health care needs and challenges, increase awareness of existing programs, seek feedback and ideas for new initiatives, and build trust and promote the hospital’s image. These include:

- Community surveys;
- Focus groups with key stakeholders;
- Task forces with hospital leaders, employees and key stakeholders;
- Conducting a community needs assessment;
- Presentations to community groups; and
- Interviews with patients, key stakeholders, and the people in the community at-large.

Sources and Additional Information

1. Health Care Trustees: Essential Partners in Advocacy. *Trustee Leader*. Healthcare Trustees of New York State. May 18, 2006.
2. Greene, Jan. A Natural Fit. *Trustee Magazine*. January 2008.
3. Sandrick, Karen. The New Political Advocacy. *Trustee Magazine*. December 2009.
4. Larson, Laurie. Telling the Story. *Trustee Magazine*. December 2009.
5. Beeler, Don A. Be an Advocate for Your Community. *Trustee Magazine*. November 2008.
6. Telling the Hospital Story: Going Beyond Schedule H. American Hospital Association. March 2009. www.caringforcommunities.org.

Rules for Building Sustainable Community Partnerships

- **Rule 1:** It’s not an event or a one-time fix, but a continuous commitment to community
- **Rule 2:** Lasting partnerships cannot be created overnight, and must be sustained over time
- **Rule 3:** Don’t reinvent the wheel; learn from and use the success of others
- **Rule 4:** Cultivate broad-based buy-in and commitment from all stakeholders
- **Rule 5:** Communicate, communicate, and then communicate some more

The “bottom line” value of being a community-centered organization is that the community will better understand the good work the hospital is doing, challenges the hospital is facing, the hospital’s efforts to address the challenges, and the barriers to success. The hospital must connect with stakeholders and key constituents in ways that can be leveraged to more successfully advance the hospital’s agenda. The benefits that result from the hospital’s community benefit initiatives must be defined, reported and discussed throughout the community to build a sense of the hospital’s health care and economic value.