

BoardBrief

Prepared for Colorado Hospital Association Trustees

Understanding Your Environment Practical Processes for Understanding Community Needs and Environmental Trends

Implementation of the Affordable Care Act, value-based purchasing, workforce shortages, transparency, governance scrutiny, health information technology, evidence-based medicine, changing demographics, economic challenges – these are just a few challenges facing hospitals and health systems in today’s complex and rapidly changing health care environment. But in order to stay true to the hospital’s community-centered mission, hospital trustees cannot let the challenges presented in today’s turbulent health care environment overpower the importance of understanding and meeting community needs.

To successfully and effectively lead their organizations, boards of trustees must have a deep understanding of the issues, challenges and needs confronting them.

They should have clear answers to questions such as:

- How dependent is our organization’s success on the direction these issues take?
- If the hospital’s mission is to improve the community’s health, what is the health status of the community?
- Does our board have the evidence and information it needs to make effective, data-driven strategic decisions?

Community needs and environmental assessments help trustees answer these questions. In addition, they provide hospitals and health systems with unique opportunities to connect with the community and maximize partnerships, and develop opportunities for building public trust and confidence.

Why Conduct a Community Needs Assessment?

A comprehensive community needs assessment provides the hospital with first-hand information about the health care needs of the community it serves. With this “snapshot” of the community’s health, the hospital can identify the most

pressing health care needs of the community, populations of individuals in need, gaps in care and services, barriers and challenges to receiving services, and information about other organizations that may already be working to meet specific needs. This information provides the foundation needed to build strategic and operational plans that will advance the hospital’s mission of service to the community. Using the data and information from the assessment, trustees can:

- Assess and evaluate where and how the hospital should direct its attention;
- Prioritize strategic initiatives; and
- Best determine the allocation of resources.

An Opportunity to Strengthen Community Relationships. A community needs assessment is also a prime opportunity to strengthen community relations and build community partnerships. For example, conducting an assessment provides opportunities for the hospital to collaborate with a variety of community organizations in the distribution of surveys and collection of data. In addition, conducting community-based focus groups and making a dedicated effort to solicit the views and opinions of community members can help build and strengthen positive perceptions of and trust in the hospital.

It’s Now Mandatory for Not-For-Profit Hospitals. Conducting a community needs assessment is more than an important

step in building community relationships and providing hospitals with the information they need to meet community needs—its also a requirement enforced by the Internal Revenue Service (IRS).

The Patient Protection and Affordable Care Act (ACA) requires not-for-profit hospitals to conduct a community needs assessment every three years. In addition, hospitals are required to demonstrate that they have undertaken strategies to address the needs identified through the assessment.

While the ACA does not prescribe how hospitals should conduct their community needs assessment, it does specify that the assessment must 1) take into account input from persons who represent the broad interests of the community served by the hospital facility, including those with special knowledge of or expertise in public health; and 2) be made widely available to the public.¹¹ The Act also states that the community needs assessment may be based on information collected by a public health agency or not-for-profit organizations, and may be conducted together with one or more organizations.

Hospitals will be required to submit their community needs assessment information on the Form 990, including a description of how they are addressing the needs identified in the community needs assessment, a description of any needs that are not being addressed, and why those needs are not being addressed.¹¹ Hospitals that do not fulfill the new community needs assessment requirements may incur a \$50,000 excise tax.

The community needs assessment requirements of the new IRS tax code related to the ACA went into effect for tax years beginning after March 23, 2012. IRS Form 990 creates a window of transparency into the hospital's efforts to understand and meet community needs. Part IV, "Supplemental Information," of the Form's Schedule H asks hospitals to:

- Describe how the organization assesses the health care needs of the communities it serves;
- Describe the community the organization serves, taking into account the geographic area and demographic constituents it serves;
- Describe how the organization's community building activities promote the health of the communities the organization serves;

- Provide any other information important to describing how the organization's hospitals or other health care facilities further its exempt purpose by promoting the health of the community; and
- If the organization is part of an affiliated health care system, describe the respective roles of the organization and its affiliates in promoting the health of the communities served.

Trustees should note the importance of this section as a critical opportunity to demonstrate and validate the hospital's efforts to assess and understand the needs of their communities. The

IRS is inviting hospitals to describe in greater detail their methodologies for determining the community benefit and services provided and to convey how these benefits and services promote the health of the community. Trustees and hospital leaders should expect the IRS and lawmakers to use this information as they determine the need for future laws and regulations governing community benefit and tax-exemption.

In fact, some experts predict that the penalty for failure to comply with the new community benefit assessment requirements will be greater than the \$50,000 fine—it could be the potential for the IRS to revoke a hospital's tax-exempt status.¹²

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Promoting Community Health

The American Hospital Association (AHA) provides the following guidelines to assist hospitals in planning and communicating their efforts to meet community needs.

- Hospitals' commitment to community health as reflected in their missions, values, and goals should be understood and applied by everyone throughout their organizations.
- Hospitals should understand their communities' unique health needs, and work with others in the community to meet those needs.
- Hospitals should periodically conduct a community needs assessment and assign responsibility for the hospital's community benefit plan to a hospital employee.
- Hospitals should have ongoing processes for planning and monitoring how their commitment to

community health is met through services and programs for the community.

- Hospitals should develop and make readily available to the public a comprehensive inventory of all the community programs and services offered, including specialty services, extended care, and programs that address social and basic needs, access, coverage, and quality of life.
- Hospitals should understand and publicly communicate the impact of their programs and services on their communities.

- If the assessment will be used to set strategic direction, identify organizational initiatives and prioritize allocation of resources;
- If the assessment is or will be used in measuring progress against an established baseline of community need(s); and
- What elements of the assessment are required to be included in the assessment in order to fulfill any legal, contractual or regulatory requirements (for example, the board may want certain demographics to be collected and analyzed to substantiate the hospital's Form 990 filing).

Practical Steps for Conducting a Community Needs Assessment

Maximizing the value of your community needs assessment requires careful forethought and planning. The process should begin with a clear definition of the objectives of the assessment by the board and the hospital's executive leadership. Hospital leadership must then communicate the importance of the assessment throughout the organization, and engage the hospital's employees in support of data collection efforts. In addition, involving community leaders and key stakeholders in the process is particularly critical to a successful community needs assessment.

Although every organization's community needs assessment process will be different, the following steps provide an overview of the steps often undertaken in a community needs assessment.

Step 1: Determine a Project Sponsor and a Project Coordinator. The project sponsor is typically a member of the executive management team, but may be a board member. This individual serves as a liaison between the coordinator, the executive team and the board. The project sponsor provides oversight and high-level guidance, provides assistance in navigating threats or obstacles to the assessment, and is accountable for the successful and timely completion of the assessment.

The project coordinator is responsible for planning and implementing the logistics of the assessment.

Step 2: Clearly Define the Objectives of the Assessment. The general purpose of the community needs assessment is to identify health care needs that exist in the community, and to determine the role the hospital should serve in meeting those needs. A more clearly defined set of objectives will also identify:

In addition to defining the information needed and how the findings will be used, the objectives should also define the assessment's geographic reach, generally considered to be the hospital's primary and secondary service area.

Step 3: Identify Available Resources. Define the budget, number of employees and other resources available and dedicated for conducting the community needs assessment.

Step 4: Develop a Detailed Plan. The project plan should include specific milestones, actions, accountabilities, dependencies and timeframes for completion. The plan should include processes for conducting the assessment, sources and methodologies for collecting data and information, a process for analyzing the results, and a plan for communicating findings and outcomes to the board, key stakeholders and the community.

Step 5: Collect and Analyze Data. Once the goals have been identified and the work plan has been approved, the next step in the assessment is to collect and analyze data. Utilizing multiple methods of data collection is recommended to ensure the widest possible opportunity for community representation and a clear picture of the issues, and can generally be divided into primary data collection and secondary data collection.

Primary Data Collection. The three most common forms of primary data collection are surveys, focus groups and personal interviews.

Surveys. Surveys are most frequently used to gather input from a larger number of people at the same time. Surveys may be conducted in various forms – a written paper survey, an online survey, a telephone survey, or a survey completed in-person by a survey-taker. Regardless of the survey format, it is important to consider the primary languages spoken in the community and provide translated versions of the survey as needed by the community.

When deciding which format to use, consider the target audience and the format that is most likely to achieve the greatest response rate. Once the format is determined, make survey submission as easy as possible. For example, if it is a written survey, design the survey form to fold into a “self-mailer” with the delivery address and prepaid postage printed on the front. Set up “survey stations” at various sites within the hospital, such as the entrance, lobby and waiting areas, admissions and business offices, cafeteria and other public spaces. Supply each station with a free-standing sign publicizing the importance of the survey and the hospital’s desire to hear from all segments of the community, and include copies of the survey and a drop box for submitting the survey.

Survey Design. Surveys typically consist of closed-end questions with multiple-choice responses. These types of questions are easier to quantify and analyze for a large number of respondents. Open-ended questions may also be included, but responses require qualitative analysis to identify key themes and issues. For example:

- A multiple choice question may ask something like: “Are there health care services that are not available in your community that you think should be?,” which the following answer options:
 - Yes, there are some services that are not available in our community and should be
 - No, there are no additional local services I need
 - There are some services not available in our community, but that is okay
- A logical follow-up open-ended question may be: “If there are needed services, what are the top 3 services you think are most needed?”
- You may also want to ask questions that allow multiple responses, such as “When you or someone in your family needs health care, are any of the following a problem? (Check all that apply),” with the following answer options:
 - Childcare
 - Finding a hospital or clinic that provides care to people without insurance, or offers free or discounted care

- Finding a hospital or clinic where the people speak my language
- Transportation

Survey Promotion and Distribution. Oftentimes, traditional survey methods fail to engage important community populations and constituencies. These populations may include the homeless, those without available Internet or telephone services, individuals with disabilities, non-English speaking people and others. The needs and perceptions of these people are important when considering the health of the entire community and how health care needs are or are not being met. When determining your survey methodology, it is important to consider using more than one method in attempting to reach the broadest possible representation of the entire community.

To overcome a lack of widespread survey access and barriers for some populations, begin by identifying a broad network of partners willing to promote and encourage survey completion. Their participation may range from willingness to sponsor an on-site computer station for online survey completion to survey distribution and promotion. Ask employers if they will include the survey with payroll distributions, include a statement of survey availability with hospital billing statements, and ask retailers if they will allow distribution of surveys to customers at their store entrances. E-mail the survey to local chambers of commerce, civic organizations and others, asking if they will distribute it electronically to their members.

The survey should be available in multiple formats, including an online version with a link directly on the hospital’s Web site, as well as a written version that can be handed out or distributed via email. The survey should be translated into multiple languages if necessary to ensure that all sub-sets of the community respond.

In addition to distributing surveys through local employers and retailers, other alternatives to consider for survey promotion and distribution include:

- Your hospital’s Web site (the survey may be available to fill out online, or as a downloadable document to print and mail in);
- Distribution to hospital employees, volunteers, trustees, foundation members and other hospital

or hospital related entities. Encourage employees to distribute the survey to friends, neighbors and acquaintances;

- Inclusion with other hospital mailings and public notices;
- Internal hospital communications;
- Local media - newspaper, TV and/or radio coverage and announcements;
- Distribution through physician offices, federal, state and/or county health clinics, other providers of health care and Medicaid programs;
- Local health insurers and agents or brokers;
- Health fairs and job fairs;
- Food banks, homeless shelters and other locations where people of limited means gather to secure resources;
- Community organizations and other entities such as senior centers, libraries and churches;
- Chambers of Commerce, Rotary clubs and other civic organizations;
- Local employers;
- Local health and fitness centers;
- Local pharmacies; and
- Other local opportunities as identified.

Focus Groups. Focus groups provide another opportunity for input from people who work with community groups and under-represented populations. Generally limited in size, focus group participants respond to open-ended questions presented by a group facilitator. Views and perspectives are discussed in greater depth than can be accomplished in a survey. A focus group may be best conducted in follow-up to a survey, allowing themes and issues identified in the survey to be further explored and validated. Sample topics or questions that may be posed to a focus group include:

- Describe what a healthy community would look like 5-10 years from now;
- Identify the ten most serious health care problems that could prevent that vision from becoming reality;

- Identify the groups of people most at risk; and
- Identify whose accountability it is to find and implement solutions to improving the health of the community.

Focus group constituencies to consider include, among others:

- Members of the medical staff;
- Clinical care providers and managers of free clinics;
- Social services agency representatives;
- Civic leaders;
- School representatives; and
- Faith-based representatives.

Interviews. Like focus groups, interviews offer an opportunity to explore and validate themes arising from survey and focus group results. Brief, highly-focused interviews may be used as a means of gathering insights from individuals, such as physicians and others, for whom scheduling focus group time is difficult. Sample interview questions that might be asked of physicians and providers include, among others:

- What top five symptoms do you treat in your office that indicate community health problems or needs?
- What do you see as the root causes or primary forces that create these health problems?
- What do people in your community encounter that keeps them from getting necessary health care?

Secondary Data Collection. In addition to collecting data directly from surveys, focus groups and interviews, organizations should supplement their findings with secondary data. This information is readily available from various sources and can contribute to the overall strength of the assessment findings.

When collecting secondary data, it is important to determine what information has the most significance and to seek out local as well as state, regional and national level data. When possible, local health information should be benchmarked against state, regional and national trends. Benchmarking allows hospital leaders to explore questions such as: "Does our

AHA's Community Connections Strategy Checklist for Leaders

The American Hospital Association has identified the following questions for hospital leaders to consider as they conduct a community needs assessment and strive for strengthened community connections.

- ✓ Have you identified the communities you serve by geography and/or by those served?
- ✓ Does your organization conduct a community needs assessment?
- ✓ As part of that assessment, does your organization collect data on the demographics of your community, including population; income statistics; percentage of uninsured; percentage of Medicaid and Medicare recipients; medically underserved populations; the number of hospitals serving the population; and other factors relevant in your service area?
- ✓ Does your organization collect data on the economic, social, cultural, and/or geographic barriers to care that exist in the community?
- ✓ Does your organization have a process to assess the health care needs of the "communities within the community" you serve, in particular highly vulnerable populations?
- ✓ Does your organization work with others in the community, such as governmental, community, and/or social service organizations, to conduct your community needs assessment?
- ✓ Do you share the results of your community health assessment with other organizations and agencies in the community?
- ✓ Does your organization use the results of the community needs assessment to set priorities for community benefit efforts and programs?
- ✓ In setting the priorities for community benefit efforts and programs, does your organization work with others in the community, such as governmental, community, and/or social service organizations, and partner on needed health initiatives?

community exceed averages for various indicators of community health?" and "Is our community's health status better or worse than that of similar communities?"

Identifying the potential causes and reasons behind these findings will help the board uncover potential opportunities and strategies for addressing the community's health care needs. Typical categories of secondary data and information to research include:

- Population growth trends and projections;
- Age trends;
- Race and ethnicity trends;
- Gender information;
- Income levels;
- Education levels;
- Uninsured rates;
- Unemployment trends;
- Rates of physical activity;
- Rates for preventive screening measures;
- Incidents of chronic disease; and
- Health care utilization.

Step 6: Develop a Summary Report of Findings. A summary report pulls together all of the findings, and should include the

objectives of the assessment, the methodologies employed, findings, implications and recommendations. The findings from the needs assessment survey, focus groups and interviews should be synthesized and compiled in an organized and logical manner that allows the board and the hospital's executive leadership to identify and evaluate the implications and develop potential strategies.

Step 7: Follow-Up. Trustees are responsible for making decisions about how the assessment results will be used. The assessment process should give the board a strong foundation for strategic planning by providing clarity about needed services and identifying specific, attainable goals for meeting community needs. Part of this process may mean determining if it is necessary to provide additional services or create new programs. Some services may benefit the hospital with additional income, while others may result in minimal or no profit. When evaluating potential new services, the board must decide if adding the services:

- Provides a substantial benefit to the community;
- Is important in fulfilling a specific community need;
- Contributes toward the community benefit activities required of tax-exempt hospitals; or
- Directly contributes to the achievement of the hospital's mission.

Communicating the assessment results to stakeholders, partners in the assessment process and other community members is an important step in engaging their continued

interest, support, trust and ownership of solutions to meeting needs and improving the health of the community.

What Does an Environmental Assessment Achieve?

In addition to conducting a community needs assessment, a good environmental and market trend assessment can provide boards of trustees with new insights and help drive sound strategic decision-making. Comprehensive environmental assessments offer:

- Relevant and reliable data needed for strategic analysis and evaluation;
- “Early warnings” of changes on the horizon;
- A consistent context for discussion, debate and decision-making;
- An integrated, holistic perspective of the health care environment;
- Improved organizational responsiveness to the environment; and
- Greater opportunity for successful achievement of strategic plan initiatives.

An environmental assessment should provide not only an outside look at the surrounding environment, but should give

trustees a complete perspective by including an inward view as well. As with a community needs assessment, a variety of primary and secondary sources of information and data should be accessed to provide the greatest possible breadth and depth of relevant information. When possible, organizations should use the information, data and reports they already gather and produce, but which may not have been historically compiled into a single resource. This will minimize duplication of effort and ensure that all available information is included in one comprehensive and integrated location.

Conducting an Environmental Assessment

Environmental assessments typically focus on health care trends and forces for change in the health care field, providing hospital leadership with a more in-depth understanding of the issues and trends occurring in key areas. The areas of focus may change over time, but a good assessment will typically highlight:

- Health care trends;
- Local demographics;
- Competitor information;
- An organizational profile;
- Quality and patient satisfaction performance;

Inside and Outside Perspectives

Examples of data and information that should be collected and evaluated in the environmental assessment include:

The Outside View

- Reform efforts, new or proposed regulatory and legislative changes occurring in the health care field
- Demographic trends
- Community health and health care access information
- The economy, finance, and economic development
- Information technology trends
- Medical technology trends
- Trends in consumerism
- Payer trends
- Political issues
- Physician and other provider changes and trends
- Quality and patient safety mandates and developments
- Competitive information including statistics, market share trends, areas of excellence, and facility development

The Inside View

- Workforce trends, such as nursing and physician shortages, aging and retirement
- Service utilization
- A portfolio of the services offered by the organization including utilization trends, market share by service line and a SWOT (strength, weakness, opportunity and threat) analysis
- Foundation and other financial resource data
- Organizational access to and utilization of technology
- Facility development needs
- Quality, patient safety and patient satisfaction measures
- Financial performance
- Medical staff development status, trends and progress against plans

- Financial performance;
- Information about the medical staff; and
- Human resource issues, such as projected shortages, turnover rates and vacancies.

Health Care Trends. Health care trend information highlights the forces for change that are projected to influence the direction of health care. Examples of current health care trends to consider include growing rates of uninsured and underinsured, health care reform efforts, rising consumer activism, increased hospital scrutiny and demands for transparency, rapid advances in science, technology and IT, workforce changes, including nursing and physician shortages, and the expansion of integrated delivery systems.

Demographics. The demographic section of an assessment provides a snapshot of local market demographics. Useful demographic information should include an overview of the organization's primary and secondary service area, population growth projections, household income overviews, local area employment, unemployment and uninsured rates, etc.

Competitors. Competitive information provides a more complete evaluation of potential unmet community needs and opportunities, and allows the hospital to monitor potential competitive threats. This section of an assessment should include comparative statistical information on competitors' number of beds, discharges, emergency department visits, occupancy, and revenue statistics. Margin trends, profitability, an assessment of range of services and market share trends should also be evaluated.

Organizational Profile. A strong summary of the organization's profile ensures that each member of the board as well as the executive staff is working with the same understanding and knowledge about the organization's current performance. A profile can also provide context regarding the resource capabilities of the organization and its ability to take advantage of emerging opportunities or to weather potential challenges to its operations. A comprehensive profile should include information about recent growth and development accomplishments such as new facilities or implementation of services. Technological capabilities and growth in patient volume should also be captured in the profile, as well as a portfolio of services and utilization trends for surgery, outpatient services, emergency department services, maternity care and other services available.

Quality and Patient Satisfaction. Quality and patient satisfaction belong at the forefront of the board's attention. Quality, safety and satisfaction performance measures, initiatives and accomplishments should be captured and their implications should be continuously reviewed and evaluated by the board. Consumer preferences and perceptions as measured by a national standardized survey of hospital patients commonly referred to as HCAHPS (Hospital Consumer Assessment of Healthcare Providers and Systems), state reporting centers and other research sources are an important component of a comprehensive environmental assessment.

Financial Performance. The hospital's financial status and resources are critical to the organization's ability to carry out strategic initiatives and realize its vision. An assessment should address income and margin statistics and trends, inpatient and outpatient revenue statistics and trends, and financial and operating ratio analyses that identify resulting trends and implications. The assessment should also include an analysis of the hospital's payer mix.

The Medical Staff. To complete an organization's profile, an assessment should include statistical information about its medical staff. This data should include medical staff composition by specialty and membership type, recruitment planning goals and recent recruitment results, discharges by specialty, and physician referral information derived from the percentage of discharges by physician.

Human Resources. Workforce shortages are a significant health care concern today and for the foreseeable future. An environmental assessment should provide the board with the information and data necessary to stay abreast of this issue, including the measurement of any efforts on the part of the hospital to counter critical shortages. This portion of the assessment should identify hospital employee issues and concerns, and should compare vacancy and turnover rates to national trends. The implementation and progress of leadership development and other workforce initiatives should also be measured, analyzed and included in the assessment.

Steps in the Environmental Assessment Process. The steps to conducting an environmental assessment are similar to those of the community needs assessment:

- **Step 1:** A project sponsor and project coordinator should be determined.
- **Step 2:** Clearly defined objectives for the assessment should be established.

- **Step 3:** Necessary financial and employee resources should be identified.
- **Step 4:** A work plan should be developed and implemented, and the work of the assessment completed.

Putting the Assessments to Work

Armed with the information provided in the assessments, the board should first ask: “What impact will trends and forces for change have on health care and on our hospital?” For example, when faced with changing medical staff demographics trustees might ask: “What are the critical projected changes in our physician workforce demographics?” and “based on these changes, what will be the key demands on the healthcare system in the next five years?”

Once the questions are framed, the organization must make astute assumptions about the implications and impacts these issues hold for the future of the hospital. The board should work with the senior leadership team to evaluate the organization’s resources, abilities and capacity to successfully respond in face of these assumptions. The outcomes of the assumptions and evaluations will lead the board and management in determining critical strategic opportunities, threats and resource gaps.

Trustees are responsible for making decisions about how assessment results will be used. The assessment process should give the board a strong foundation for strategic planning by providing clarity about health care trends and needed services, and help identify specific, attainable goals for meeting community needs. The board must decide if adding (or eliminating) services:

- Provides a substantial benefit to the community;
- Is important in fulfilling a specific community need;
- Contributes toward the community benefit activities required of tax-exempt hospitals; or
- Directly contributes to the achievement of the hospital’s mission.

Communicating the assessment results to stakeholders, partners in the assessment promotion and other community

members is an important step to engaging their continued interest, support, trust and ownership of solutions to meeting needs and improving the health of the community.

Making the findings of the community health needs assessment widely available to the public is also a requirement of the ACA, which can meet by posting the written community needs assessment report on the hospital’s website.

Three Ways to Maximize Your Investment

Leverage the Work. The environmental assessment is a significant resource of information that can be used in multiple ways by individuals and departments throughout the organization. It should become a dynamic “go to” document that is shared widely within the hospital. As requests for information and data are made throughout the year, they should be noted and evaluated for relevance. If deemed appropriate, new information and data should be incorporated into the assessment to continue building and improving on the strength, relevance and usefulness of the organization’s environmental intelligence.

Put the Assessments to Work at Board Retreats. Community needs and environmental assessments provide a strong, evidence-based foundation upon which the board can build its strategic plan. Entering a retreat armed with assessment data and information, trustees can envision and develop critical assumptions about the trends and forces expected to influence the health care field in coming years. Required capabilities and resources to meet those assumptions can then be identified, and the organization’s readiness can be assessed. Assessment knowledge and the assumptions derived from it allow trustees to better evaluate current strategies and to develop new, targeted strategies for achieving its mission and vision.

Ask “What Do We Know?” Assessment work does not end with a board or leadership retreat. Staying attuned to the community and the health care environment requires on-going effort. Trustees must continually ask “What do we know today that we didn’t know at our last board meeting? Does this new knowledge in any way change any of our assumptions?” And “If so, how does that change affect our capabilities and strategies moving forward?”

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