



# Partnering with Novant Health

Novant Health social responsibility



**Due to high volume of participants we will not open the chat feature. If you have questions throughout the presentation please email them to [SocialResponsibilityWS@novanthealth.org](mailto:SocialResponsibilityWS@novanthealth.org)**

# Mission

Novant Health exists to improve the health of communities, one person at a time.

# Vision

We, the Novant Health team, will deliver the most remarkable patient experience in every dimension, every time.

**Safety • Quality**  
**Authentic personalized relationships**  
**Voice & choice • Easy for me**  
**Affordability**

# Values

Diversity and Inclusion  
Teamwork  
Personal excellence  
Courage  
Compassion

# Our people

We are an inclusive team of purpose-driven people inspired and united by our passion to care for each other, our patients and our communities.

# Our promise

We are making your healthcare experience remarkable. We will bring you world-class clinicians, care and technology – when and where you need them. We are reinventing the healthcare experience to be simpler, more convenient and more affordable, so that you can focus on getting better and staying healthy.

# Background



Investments align with **community benefit** strategy to **maximize impact** of charitable contributions



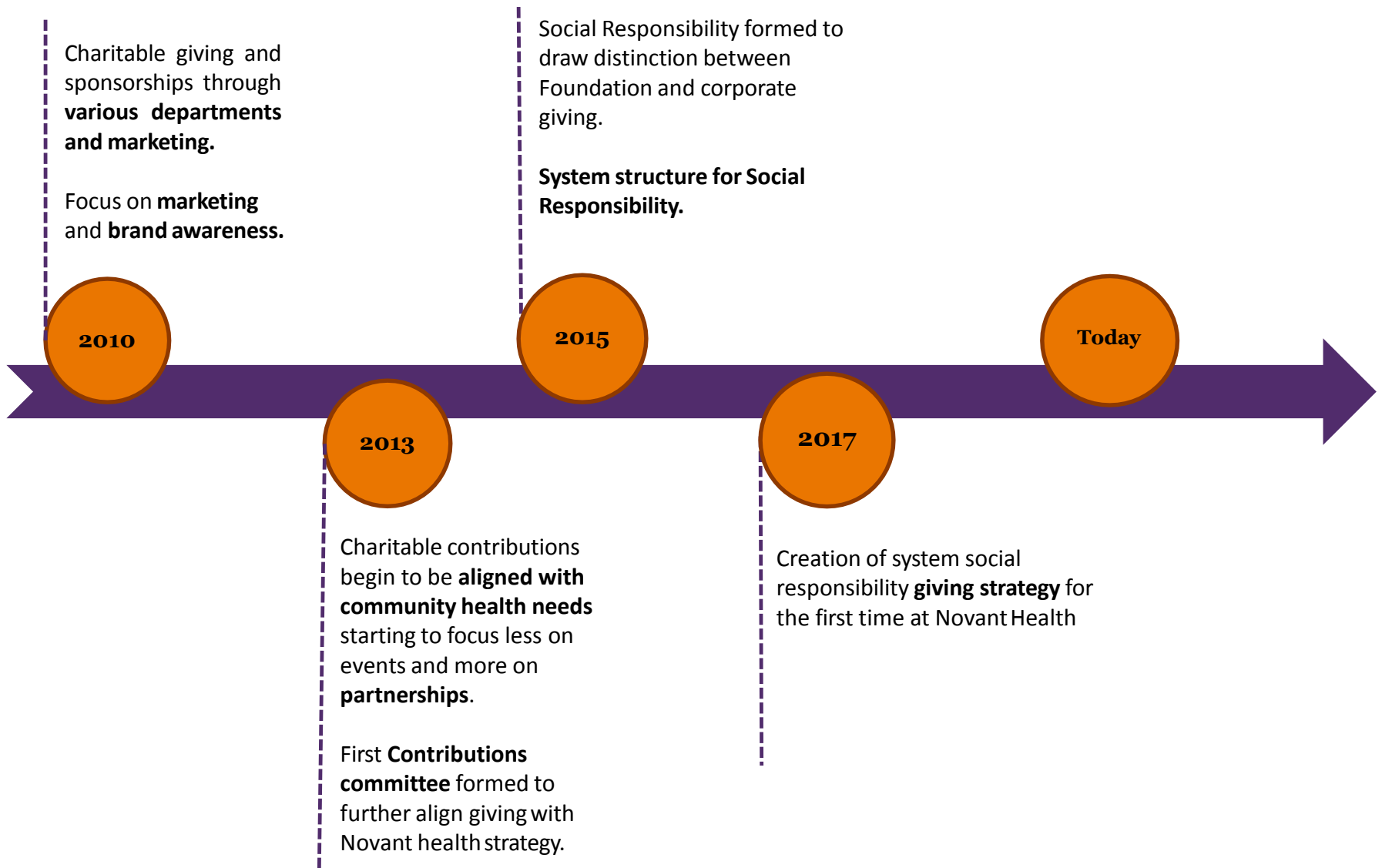
Clearly defined investment priorities will lead to **measurable health outcomes** for the communities we serve



Giving guidelines will ensure investments are made in high performing, sustainable **partnerships** that will contribute to **healthier communities**



Leveraging partnerships will allow us to share our **philanthropic story** and **engage team members**



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# Social Responsibility Mission

The mission of social responsibility at Novant Health is to improve the health of our communities, one person at a time, through charitable contributions and strategic partnerships that align with our three investment priorities of health and human services, environment and education. Through these investment priorities, Novant Health supports community-based programs that address health inequities and improve health outcomes.

Social Responsibility works to support the overall Novant Health mission by investing in the communities in which our patients and team members live and work through charitable contributions, nonprofit partnerships, volunteerism and in-kind donations.

By investing in the health and well-being of our communities, we make our communities better places to live and work.

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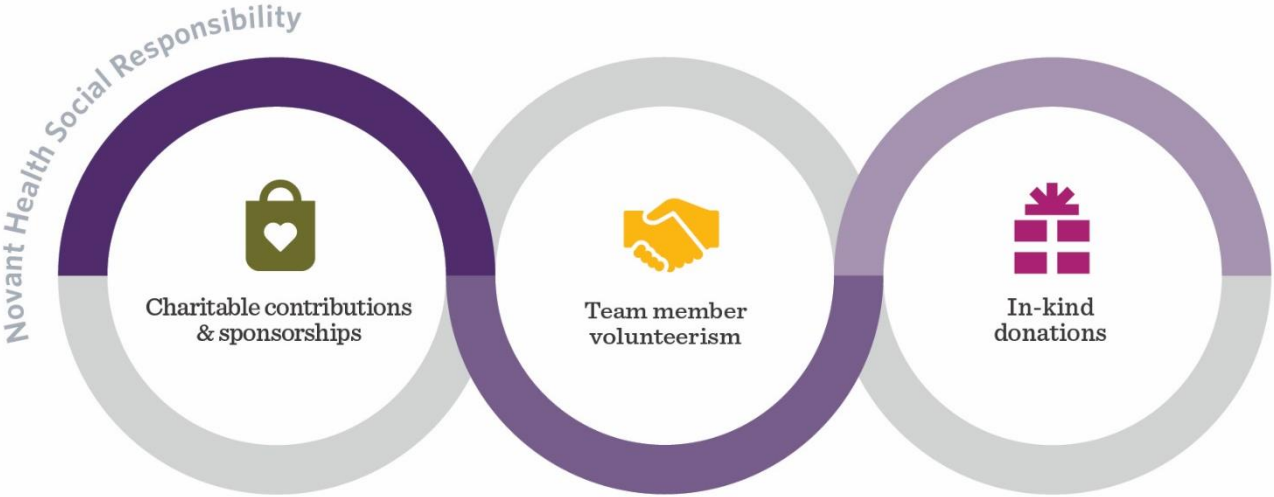


# Guiding Principles

We invest in the health and well-being of our communities through supporting community-based programs that align with these guiding principles:

- Close fit with Novant Health's mission, vision and values
- Positive impact to identified community health needs and/or social determinants of health
- Intentional focus on our communities' most vulnerable populations


# Social Responsibility overview





# Community Benefit

# Health Needs Assessments and Implementation Plans

A circular graphic with a dark olive green background and a white border. The text inside is white and reads "Community Health Needs Assessment (CHNA)".

## Community Health Needs Assessment (CHNA)

- Required for each acute-care facility to define the needs of primary and secondary service areas
  - Productive and meaningful way to engage local health departments and community partners
- 

A circular graphic with a dark teal background and a white border. The text inside is white and reads "Community Benefit Implementation Plan".

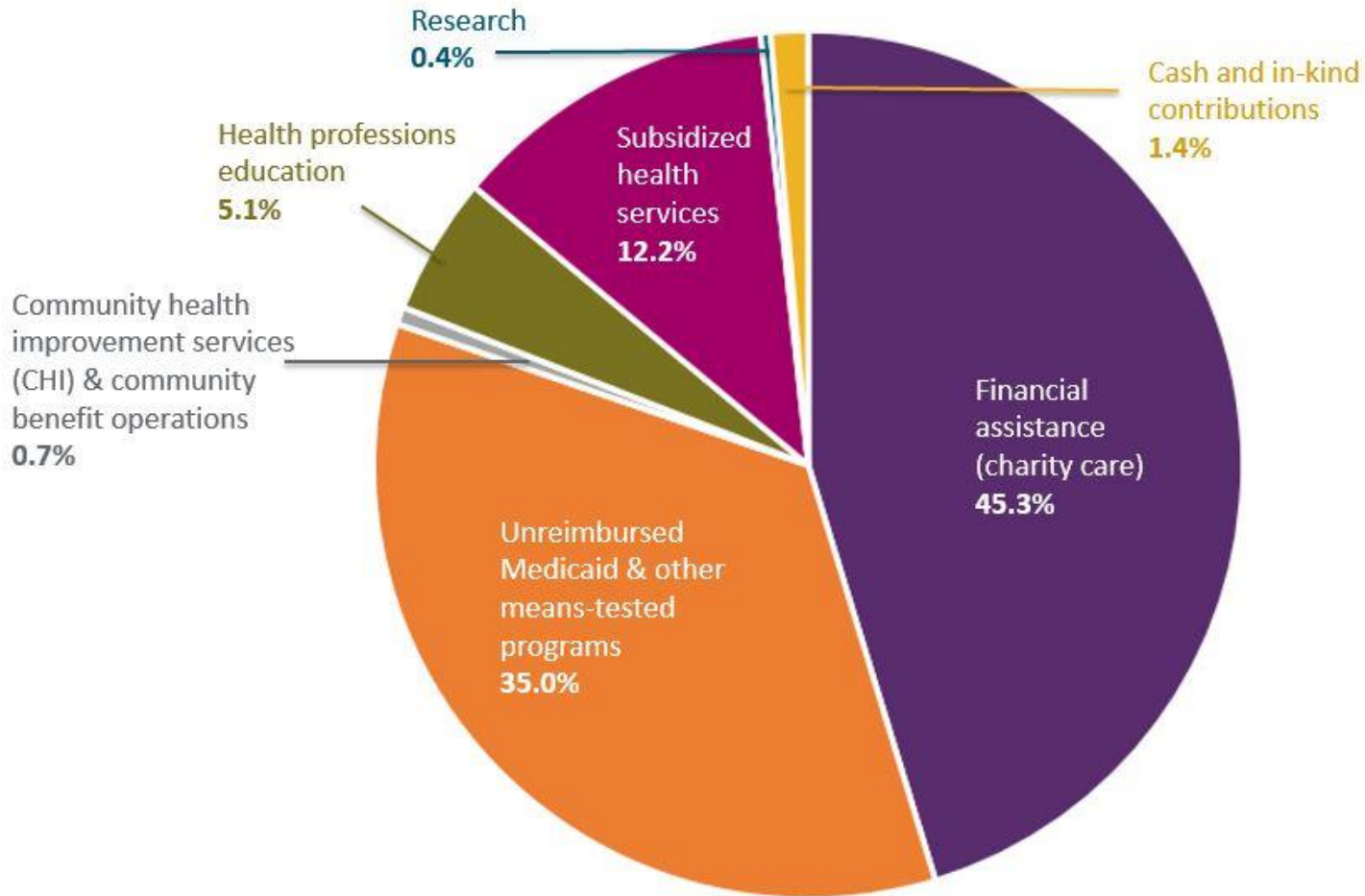
## Community Benefit Implementation Plan

Implementation plans are attached to IRS Form 990 and include a description of how the facility plans to address the significant health needs identified in the CHNA by:

- Describing the actions the facility plans to take to address the identified need including any planned collaboration
- Describing the anticipated impact of these actions
- Identifying the resources to be committed
- Identifying those needs that won't be addressed and why

# What is community benefit?

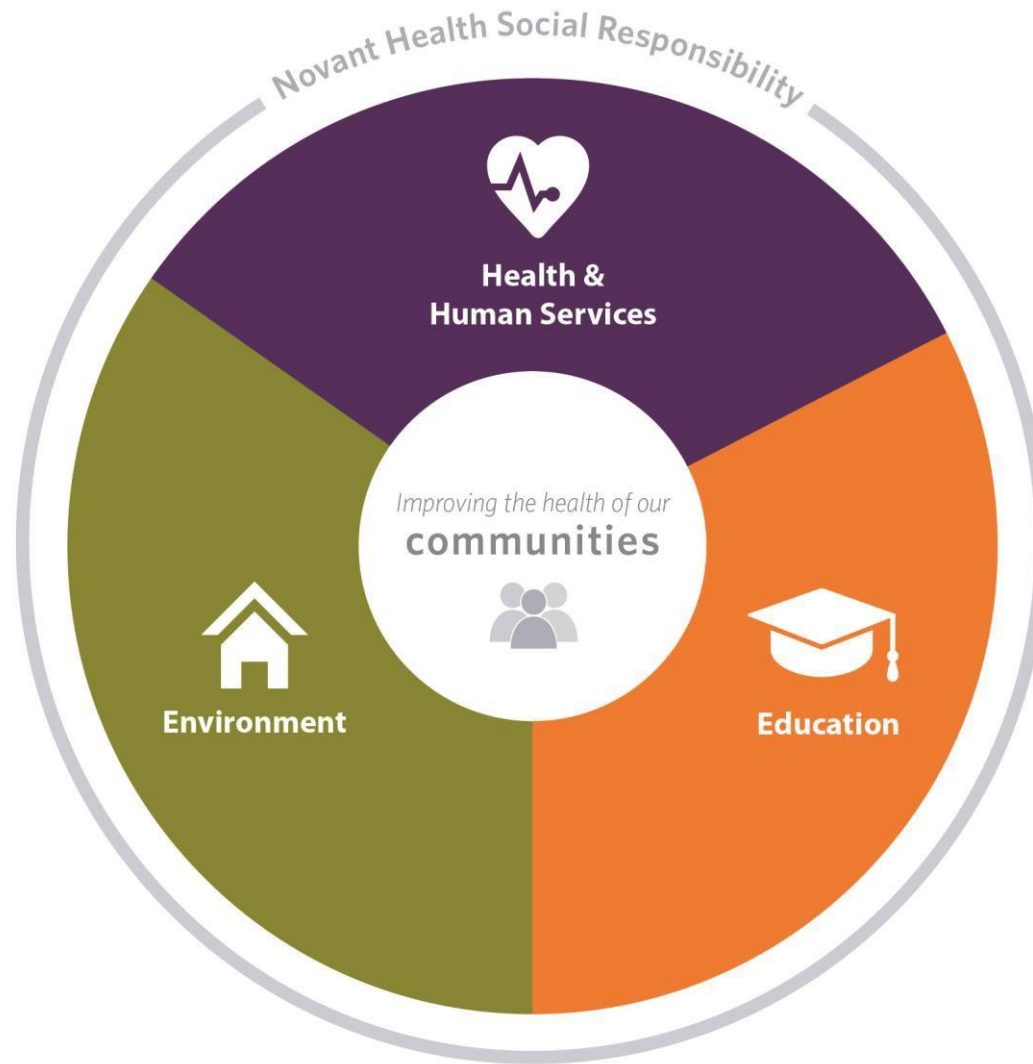
In 2017, the Novant Health system provided more than \$794 million in community benefit through the following categories:



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# Investment Priorities

# Investment Priorities



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# Health and Human Services

- Goal:
  - To improve the health of individuals in our communities by promoting health, healing and treatment in response to identified community health needs
  
- Objectives:
  - Improve access to healthcare services
  - Raise awareness of and encourage healthy behaviors
  - Address preventable health risk factors
  - Support patients and their families' needs through community-based programs

# Environment

- Goal:
  - To support safe and clean communities
  
- Objectives:
  - Increase food access, food security and nutrition education
  - Support sustainable, positive neighborhood change and revitalization
  - Promote active lifestyles and healthy behaviors

# Education

- Goal:
  - To build the pipeline for the future healthcare workforce
  
- Objectives:
  - Support early childhood development programs
  - Enhance college and career readiness in the medical and health sciences career pathways



# Community Impact

Novant Health supports the economic development of its communities through its support of local chambers of commerce and local city, town and county initiatives that impact health and safety.

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# Giving Guidelines

# Eligibility ▪ Charitable Contributions

In order to be eligible to receive a monetary contribution or an in-kind contribution from Novant Health, an organization must meet the following eligibility criteria:

- Be a tax-exempt public charity under Section 501 (c)(3) of the U.S. Internal Revenue Code (Note: Other acceptable, tax-exempt organizations, such as under Section 501c(4) or 501c(6) may be eligible for community impact funding)
- Serve communities that are also served by Novant Health
- Serve communities without discrimination against any individual on the basis of race, creed, gender, age, sexual orientation or national origin
- Provide clear goals and measurable outcomes data that supports the organizations positive community impact

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# Eligibility ▪ Sponsorships

- Align with mission, vision, and values of Novant Health
- Support or align with clinical service offerings
- Support or align with Novant Health growth priorities and provide us with visibility in key markets
- Organization or event reaches healthcare consumers we serve or would like to serve
- Organization or event reaches a diverse and/or underserved populations
- There is a measurable return on the investment, either financial or as measured against other priorities using data provided by organization

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## Support will NOT be extended to:

- Individuals, including those seeking scholarship or fellowship assistance
- Religious or evangelical organizations, programs, or projects
- Organizations with a substantial purpose of influencing any political, legislative or regulatory cause
- Fraternal, veteran or labor membership organization serving only the members of that organization
- Pass-through organizations
- Capital campaigns or campaigns seeking funding for construction of facilities or land acquisition unless there is a clearly identifiable connection to Novant Health's mission and vision.

# Cont'd

- Little League teams, booster clubs, fraternities or other civic clubs or organizations
- Activities or organizations that do not support our public purpose
- For-profit organizations
- Individual schools (public or private) or organizations that operate within an individual school
- Request for matching funds from our organization for team member donations

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# Online applications

# What's new!

## Starting Aug. 1

Two forms: charitable contributions & sponsorships

Funding guidelines for both sponsorships and charitable contributions

Updated social responsibility mission information

Updated funding cycle information

Investment priority information

Please email all questions to [SocialResponsibilityWS@NovantHealth.org](mailto:SocialResponsibilityWS@NovantHealth.org)





# Charitable contribution questions

- 1. Please identify the investment priority request falls under**
- 2. Please provide a detailed program design outlining your proposed project. Clearly identify the program goals, objectives, and budget for how the program funds will be used**
- 3. Please describe how you will monitor outcomes to show impact. How do you plan to sustain and build on outcomes?**
- 4. Population/area served**
- 5. Mission of your organization**
- 6. Board of directors**
- 7. Team member engagement opportunities**

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# Sponsorship questions

1. **Is this a request for one event or a bundled package?**
2. **Board of Directors**
3. **Expected attendance (number of attendees/participants)**
4. **Percent of funds that directly impact organization's charitable purpose**
5. **Attach list of all sponsorship opportunities**
6. **Deadline for ad/logo**
7. **Who is the target audience for this event**
8. **Describe how this event positively impacts the community, Novant Health, and your organization**

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	Sponsorship	Charitable Contribution
Marketing focus	✓	
One time event or series of events	✓	
Entitlement or naming rights	✓	
Year-long partnership		✓
Aligns with Health Needs Assessment		✓
Outcomes and community health impact focus		✓
Aligns with a Novant Health investment priority	✓	✓
Alignment with Novant Health mission, vision, values	✓	✓
Prioritized by Novant Health social responsibility		✓

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# Enhanced process

# Quick tips

- Typical charitable contributions range from \$1,000 to \$25,000. (Please note: there may be market variability based on budget, need, priorities, etc.)
- Organizations must submit an online application to be considered for funding.
- The Health & Human Services cycle begins Aug. 1, 2018 and the application deadline is Sept. 14, 2018, to be funded in 2019.
- Applications may be submitted at any time during each funding cycle.
- Organizations may only submit one application, per market.

# Out of cycle notice

Thank you for your interest in being reviewed for a charitable contribution or sponsorship from Novant Health Social Responsibility. We are currently not accepting applications, as our cycle period is closed. Please refer to our investment priorities for funding, as well as the cycle submission periods for both charitable contributions and sponsorships.

Contribution requests will be accepted on the following timeline:

<b>Investment priority</b>	<b>Request for proposals (RFP) timeline</b>
Health and human services education	August 1 to September 14
Education	January 1 to February 14
Environment	April 1 to May 14

Sponsorship requests will be accepted on the following timeline:

- **April 1- May 15** for events occurring **August through December**
- **October 1- November 15** for events occurring **January through July**

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# Timeline

## Charitable Contributions

### RFP Submission Window

Health & Human Services

Aug. 1 – Sept. 14

Education

Jan. 1 – Feb. 14

Environment

April 1 – May 14

Community Impact

On-going, by invitation only

## Sponsorships

### Submission Window

Events occurring Jan. – July

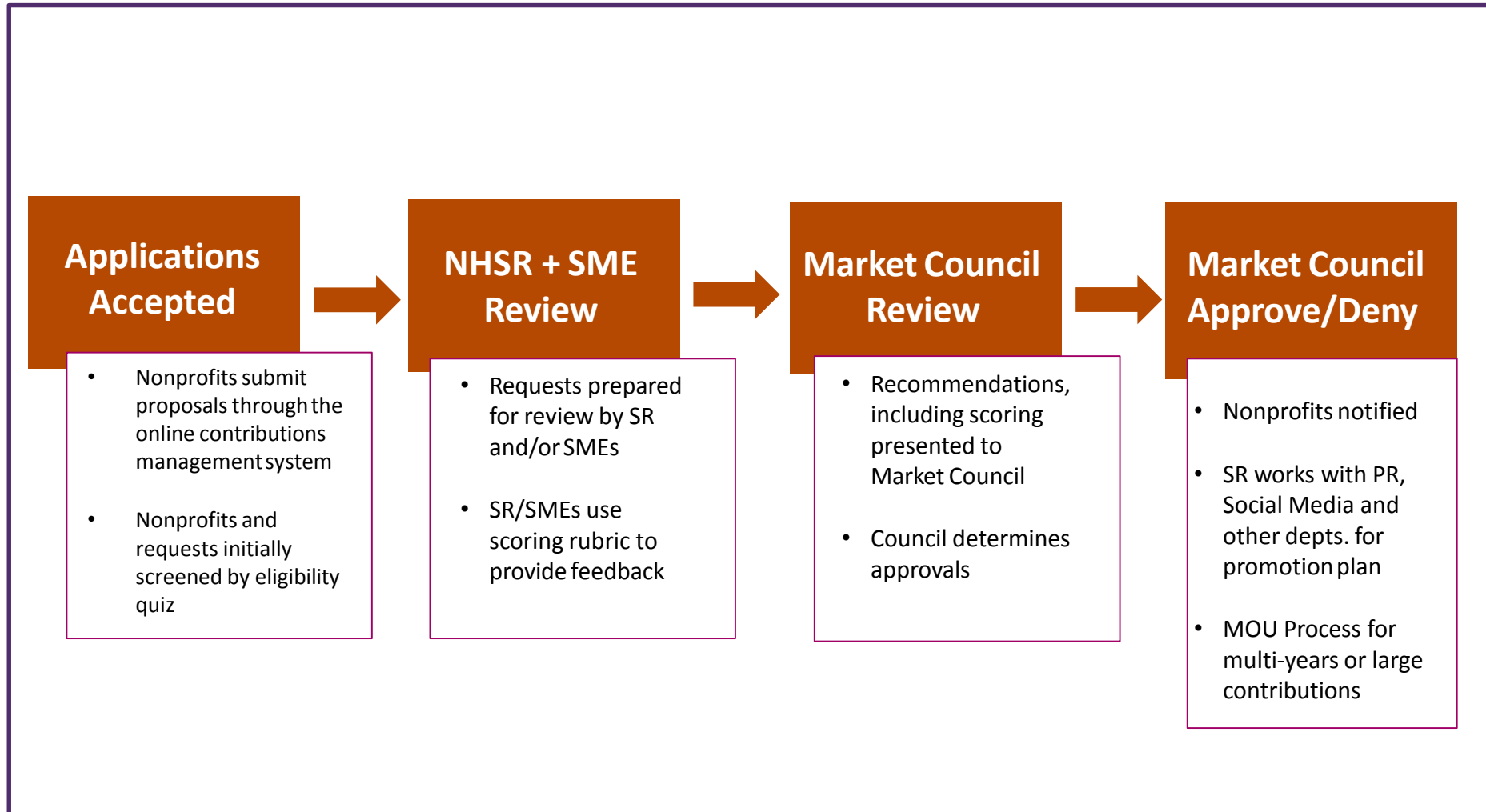
Oct. 1 – Nov. 15

Events occurring Aug. – Dec.

April 1 – May 15

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# Contributions Review Process for each Investment Priority



Please email all questions to [SocialResponsibilityWS@NovantHealth.org](mailto:SocialResponsibilityWS@NovantHealth.org)



# Notification and payment

- 1. Emailed PDF of letter with decision**
- 2. Instructions within restricted letter for payment**
  - Banking information
  - Invoice
  - Contribution form
- 3. Acknowledgement letters are required from each organization**

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# Restricted letters



February 2, 2017

Crisis Control Ministries  
200 10<sup>th</sup> St E  
Winston-Salem, NC, 27101  
Attn: Shannon Heck

**Forsyth Medical Center**

3333 Silas Creek Parkway  
Winston-Salem, NC 27103

Shannon:

I am pleased to inform you that Novant Health Forsyth Medical Center is committing a gift of \$15,000 designated for the Charitable Clinic and Pharmacy. Your program provides a critical service for residents of Forsyth County, specifically addressing one of our greatest community needs around, access to care. Accordingly, you should consider this donation to be restricted to that purpose. As a health care provider committed to the health and well-being of our community, we are pleased to partner with you to continue to improve the health of our communities one person at a time.

If you list this gift in any publications, presentations or press releases, the correct reference is Novant Health.

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# Moving to outcomes and engagement

# Demonstrating Outcomes: Overview



Organizations are expected to provide data demonstrating their positive impact on identified community health needs and/or social determinants of health.

## 1. Determine what success looks like:

- Number of individuals in target population receiving education or service
- Behavior change among participants (knowledge, skills, confidence change)
- Health outcome change among participants (biometric change)

## 2. Establish a baseline to demonstrate impact:




- Pre/Post Comparisons (evaluates the same group at different times)
- With/Without Comparison (evaluates two different groups)

## 3. Gather data:

- Quantitative (surveys, participation rates, biometric measurements)
- Qualitative (interviews, focus groups)

*Keep it simple  
and realistic!*

# Demonstrating Outcomes: Examples

 <p>Environment</p>	<ul style="list-style-type: none"><li>• Number of vulnerable persons provided food access (with &amp; without)</li><li>• Demonstration of positive neighborhood change (pre &amp; post)</li><li>• Usage metrics for parks, trails or housing units in target neighborhoods</li></ul>
 <p>Health &amp; Human Services</p>	<ul style="list-style-type: none"><li>• Number of persons afforded access to care (with &amp; without)</li><li>• Demonstration of behavior change (pre &amp; post)</li><li>• Demonstration of biometric change in preventable risk factors</li></ul>
 <p>Education</p>	<ul style="list-style-type: none"><li>• Number of programs offered to students in target population</li><li>• Number of students successfully completing program</li><li>• Demonstration of knowledge, skills and abilities gained</li></ul>

# Team Member Engagement

- Volunteer opportunities
- Board involvement
- Committee involvement

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“With great power comes  
great responsibility.”

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# Resources

- **Fact sheets**
- **Presentation**
- **Audio file**

[Novanthealth.org/SocialResponsibility](https://Novanthealth.org/SocialResponsibility)

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Thank you.

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