



of South Central Wisconsin

## **Policy and Procedure**

**Title:** GHC-SCW Community Giving Policy

**Responsible Party:** Community Health Manager and Marketing & Communications Manager

**Div/Dept/Serv Area:** SLT, Community Health, Marketing, and Human Resources

**Policy Number:**

**Date of Issue:** 6/2023

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### **1) PURPOSE**

This policy aims to keep with the Group Health Cooperative of South Central Wisconsin (GHC-SCW) brand promise to our members, "Better Together," and commit to strengthening local communities. It is the philosophy of GHC-SCW to invest in community giving opportunities that eliminate barriers and work to improve the social determinants of health for our members. Our beliefs about dignity and respect, diversity, equity, and responsibility, as well as our guiding principles around collaboration, community involvement, innovation, and belonging, are integral aspects of the way we work with our community partners to develop forward-thinking solutions that improve the health and well-being of our members, patients, staff and community.

### **2) GHC-SCW COMMUNITY GIVING POLICY**

The overall objective of this policy is to set universal understanding, structure and decision-making for all community giving at GHC-SCW.

#### **What is community giving?**

GHC-SCW community giving is grounded in the belief that giving back is a powerful tool for staying community involved while supporting local organizations that reflect our mission, vision, values and belief statements. At GHC-SCW, community giving is defined as the act of donating time, money, or resources to organizations that work towards creating positive change in the community. This can include supporting causes such as education, health, equity and the community.

### **3) GHC-SCW COMMUNITY GIVING PHILOSOPHY**

GHC-SCW invests in organizations through a variety of methods, including charitable contributions, sponsorships and events, staff volunteer opportunities, and community health programs that promote strong ties with local organizations to create measurable, positive changes in the community. Below are the community giving methods:

### 1. *Charitable Contribution (Financial or Product)*

Charitable contribution refers to the act of donating money or products to a charity or non-profit organization.

*To be determined a charitable contribution, the organization that the funds are donated to **must be** a 501(c) organization under the IRS code. Donations given to other tax exempt organizations are not tax deductible. Generally, organizations will send a letter to the donor to help assist in determining the charitable donation. In addition, the donor cannot receive any benefit from the donation, for example a golf event. Any amount of sponsorship that is determined not to be charitable in nature is added back to taxable income. Source: Grant Thornton.*

### 2. *Sponsorships and Events*

Sponsorships and events refer to financial or product contributions to support organizations and their initiatives, such as races, fundraisers, galas, booths and other events. Sponsorship support is typically given in exchange for some form of recognition or exposure, such as advertisement during an event, branding on a website, logo placement on a product or clothing or other promotional methods.

### 3. *Staff Volunteer Opportunities*

Staff volunteer opportunities refer to opportunities for employees of a company or organization to volunteer their time and skills to support charitable causes or non-profit organizations. These opportunities can take many forms, such as participating in a community service project, mentoring or tutoring students, or organizing a fundraising event. Staff volunteer opportunities are often organized by the employer or an employee volunteer program and are occasionally done during the workday or on company time.

These opportunities can help employees to develop new skills, network with other professionals, and feel a sense of purpose and fulfillment while contributing to the Community. They can also promote teamwork and a positive corporate culture within the company.

### 4. *Community Health Programs*

The Community Health Programs under the Medical Services division support GHC-SCW patients and Dane County community members through several programs and initiatives aimed at reducing barriers to healthcare and improving health outcomes for marginalized communities. Program support may or may not benefit GHC-SCW patients or members.

## **4) Organization Preferences**

*GHC-SCW focuses on strengthening local communities. Organizational preferences are given to:*

- Non-profit organization.
- Mission and values closely aligned with GHC-SCW mission, vision, values and beliefs.
- Organizations that focus on health and well-being in our GHC-SCW service area.

## **5) Restrictions**

Community giving requests will not be considered for the following criteria:

- Requests that do not align with GHC-SCW's community giving philosophy
- For-profit organizations that **do not** positively impact the social determinants of health and quality of care for our community
- Partnerships and capital giving requests
- Political or partisan organizations
- Religious, anti-religious, labor groups or organizations
- Personal endeavors (e.g., school clubs/organizations including but not limited to bands, athletic or academic teams, booster clubs, PTO/PTA, pageants, sports programs and extracurricular school activities)
- Sports teams, athletic facilities, and leagues
- Advertising programs, bulletins, yearbooks, calendars, brochures, etc.
- Any donation in violation of GHC-SCW's Bylaws

## **6) Procedures**

### ***Planning and Budgeting***

- The Board approves the organization's multi-year strategic plan and annual operating budgets developed by Senior Leaders and Managers.
- Managers are responsible for carrying out the consistency of this policy and adapting it to their departmental work.
- Managers with partnership & community giving annual funds are responsible for assessing, implementing, tracking, overseeing, and reporting their departmental giving plan.
- Managers ensure that reports are provided to key stakeholders, managers, and staff about the organization's partnership efforts as needed.

*Needs may be identified by collecting and analyzing information from a variety of sources. New information may be collected through community health needs assessments, written surveys, personal interviews or focus groups, community forums, community-based collaborations or councils, or other means.*

### ***Community Giving Applications***

- Organizations applying for a community giving request should submit a completed community giving request form on the GHC-SCW website. Paper applications are available upon request.
- GHC-SCW will review all requests to determine eligibility and availability of funds.
- GHC-SCW will send approval or denial notices to applicants within 90 days.

*All applications will be evaluated using consistent criteria to help with decision making across all community giving requests.*

### ***Monitoring and Evaluation***

- GHC-SCW evaluates the structure of its community giving relationships on an annual basis, including resource commitments; relationships with community organizations and other stakeholders; updated information about community needs; the organization's overall goals for community giving.
- GHC-SCW evaluates on an annual basis how well its community giving strategies are being carried out in terms of the overall impact, use of staff and quality.

### **Reporting**

- GHC-SCW implements accounting practices that guide the categorization, measurement and reporting of community giving activities.
- GHC-SCW employs various communication vehicles for reporting community giving to specific internal and external audiences.

*Examples include the annual community giving report; newsletters; social media; membership emails, verbal presentations, orientation programs for new staff and new Board members; community health fairs and screening, meetings with the media, and membership materials.*

### **Promotion and Communication**

- GHC-SCW marketing department handles the promotion of our community giving activities on a case-by-case basis. The marketing department may use newsletters, member emails, social media, marketing materials, website content and internal staff communication as means of promotion.
- GHC-SCW may share details about community giving within internal staff email communications, monthly staff newsletter or through the employee intranet site.
- In general, photographers need to obtain a signed release form from any identifiable individuals who appear in photographs that will be used for commercial purposes, such as advertising or stock photography.

*The GHC-SCW community giving policy will be shared in full per individual request.*

**ATTACHMENTS**

Attachment A: Mission, Vision, Values and Belief Statements

## Attachment A

### **GHC-SCW Mission, Vision, Values and Beliefs**

**Our Mission speaks to who we are and why we exist.**

**Mission: We partner with members and the communities we serve to maximize health and well-being.**

**Our Vision represents who we aspire to be.**

**Vision: As a local, not-for-profit, member-owned Cooperative, we are the most trusted resource for lifelong health and well-being in the communities we serve.**

**Our Values are a set of beliefs that we hold dear. They help us identify priorities for the Cooperative and act as a guide for how we conduct our business.**

- We are a not-for-profit Cooperative.
- We are member-centered.
- We are equitable and inclusive.
- We are quality-driven.
- We are innovative.
- We are community involved.

**Our five strategic pillars are essential areas of focus, investment and effort that help us advance toward achieving our Vision and fulfilling our Mission:**

- **Exceptional Quality and Service** - We seek excellence by working towards the elements of the quadruple aim, and we strive to be the best in all that we do.
- **Meaningful Employee Engagement** - We create a culture where employees are involved, enthusiastic and committed to delivering on the GHC-SCW Mission, Vision and Values.
- **Continuous Improvement** - We actively identify opportunities and initiate change that creates value for the Cooperative and those we serve.
- **Financial Strength** - We ensure the Cooperative's long-term viability by reinvesting earnings generated by controlling health care costs and consistently growing revenue.
- **Impact** - We advance health and well-being by nurturing connections with our member-owners and the communities we serve.

### **We Believe Statements**

**GHC-SCW is committed to fostering a caring and compassionate environment while ensuring that individual differences are valued. We are a quality-driven cooperative built on collaboration, community involvement, innovation, and belonging. It is essential that all employees, members, and patients feel secure and welcome, that the opinions and contributions of all individuals are respected and that all voices are heard.**

- Healthcare is a human right.
- In treating all people with dignity and respect.

- There is strength in diversity.
- Equity celebrates our humanity.