





Our Mission

We, Trinity Health, serve together in the spirit of the Gospel as a compassionate and transforming healing presence within our communities.

Our Core Values

Reverence

We honor the sacredness and dignity of every person.

Commitment to Those Who are Poor We stand with and serve those who are poor, especially those most vulnerable.

Safety

We embrace a culture that prevents harm and nurtures a healing, safe environment for all.

Justice

We foster right relationships to promote the common good, including sustainability of Earth.

Stewardship

We honor our heritage and hold ourselves accountable for the human, financial and natural resources entrusted to our care.

Integrity

We are faithful to who we say we are.

Our Vision

As a mission-driven innovative health organization, we will become the national leader in improving the health of our communities and each person we serve. We will be the most trusted health partner for life.

All good things begin with gratitude 🖤



My reflection on the past year underscores how proud and in awe I am at the speed by which our Community Health & Well-Being teams adapt to the ever-changing context we find ourselves in daily. We support those most vulnerable in our communities by addressing patient social needs, strengthening our community partnerships and impacting the social influencers of health through policy, systems and environmental change strategies. Our local teams are resilient and nimble and are engaging with our communities in new ways to understand and advance health and racial equity.

We recognize that our community members and their lived experience bring tremendous value and it is vital that they be seated at the table with us as we work together to build capacity within our communities and develop solutions that address our communities' significant health needs.

We are proudly on a journey to advance health and racial equity and recognize it takes time, resources, strong partnerships and trusting relationships. In 2020, Trinity Health declared racism as a public health crisis. Racism is a root cause of poor health and many of our communities have faced decades of disinvestment. We are committed to centering equity in all that we do - from engaging our teams and partners to designing and evaluating interventions to funding community-based initiatives.

Thank you to those who have engaged with us on this journey. I am so grateful for your partnership and can't wait to see what we do together in the year ahead.

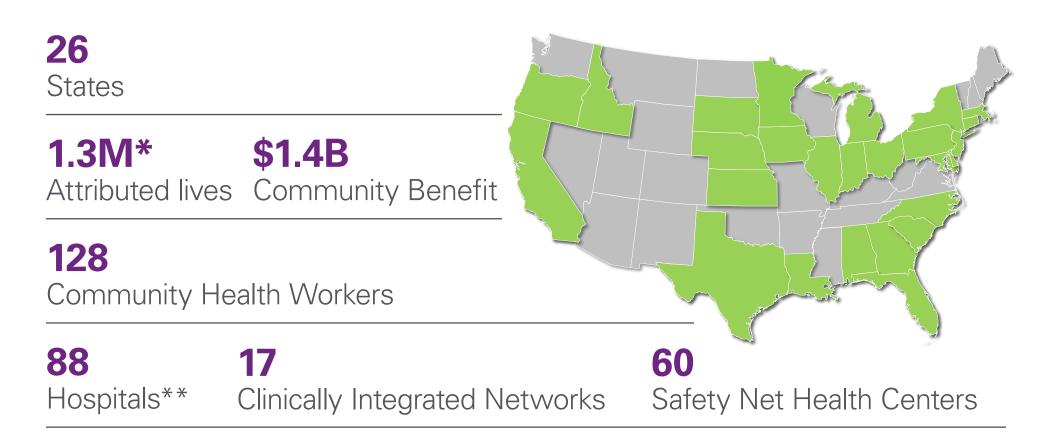
Jaime Dircksen, Vice President, Community Health & Well-Being



Our community members, and their lived experience, bring tremendous value and it is vital that they are seated at the table with us.



Trinity Health is **one of the largest**Catholic Health Systems in the nation



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Diabetes Preventation Programs

FY22 data unless noted, includes MercyOne (unaudited). *Trinity Health FY22 data only; excludes MercyOne FY22 data (not available). **Owned, managed or in JOAs or JVs.

Community Health & Well-Being

Trinity Health's Community Health & Well-Being (CHWB) strategy promotes optimal health for people experiencing poverty and other vulnerabilities in the communities we serve by connecting social and clinical care, addressing social needs, dismantling systemic racism and reducing health inequities. We do this by:



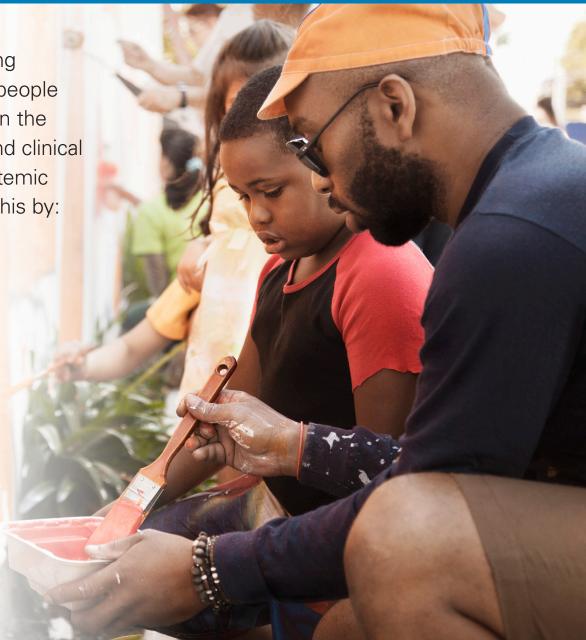
Investing in Our Communities



Advancing Social Care



Impacting Social Influencers of Health



Our Approach to Health & Racial Equity

Health equity means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care.

- Robert Wood Johnson Foundation

While community health needs assessments (CHNA) and Implementation Plans are required by the IRS, Trinity Health ministries have historically conducted CHNAs and developed Implementation Plans as a way to meaningfully engage our communities and plan our Community Health & Well-Being (CHWB) work.

In FY22, Trinity Health committed to embedding a racial equity lens to the development of our CHNA Implementation Plan. Implementation plans are developed in partnership with residents and community stakeholders, and focus on specific populations and geographies most impacted by the needs being addressed. Racial equity principles are used throughout the development of these plans and continue to be used during the implementation. Our leaders were challenged to focus on policy, systems and environmental change strategies as these system changes are needed to dismantle racism and promote health and wellbeing for all members living in the communities we serve.

To assist Trinity Health hospitals and partners to intentionally engage with communities and residents experiencing poverty and other vulnerabilities, the System Office CHWB team and Transforming Communities Initiative (TCI) technical assistance providers launched two training series to advance health and racial equity in our communities:

- 1. CHWB Leader Series to Advance Health and Racial Equity: A year-long peer learning series, to build the capacity of our CHWB leaders to deliver on our CHWB strategy with a focus on community leadership and engagement, and the use of a racial equity lens in all of our decision making.
- 2. Community Engagement to Advance Racial Justice preparing for Implementation Strategy: A 4-part series on engaging our communities in meaningful ways using a health and racial equity lens to build lasting partnerships and design impactful implementation strategies.

A new Implementation
Strategy Guide was
created in fiscal year 2022,
focusing on authentically
engaging with the community
in the development of a
CHNA Implementation Plan.
The guidance outlines best
practices to evaluate the



impact of actions directed toward addressing community needs, as well as ensuring compliance with IRS section 501(r) requirements.



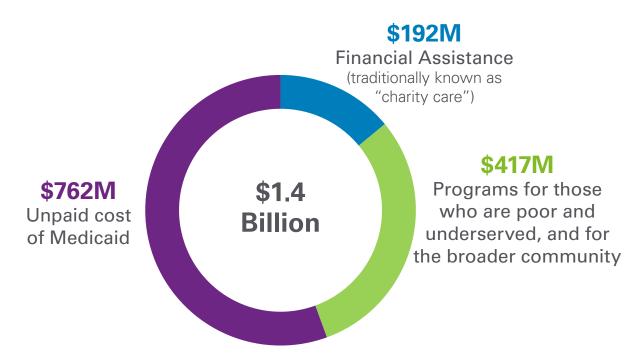
Birth Equity Improvement Project

(Trinity Health New York, Albany, New York) - Per the Governor's Taskforce, in New York State, Black women are approximately three times more likely to die in childbirth than White women. Interdisciplinary teams from Samaritan and St. Peter's hospitals are part of the New York State Birth Equity Improvement Project focused on how individual and systemic racism impacts birth outcomes. Action plans were developed to improve the experience of care and perinatal outcomes of Black birthing people in the communities we serve.

Community Benefit: \$1.4 Billion

Trinity Health and its regional health ministries are committed to the delivery of people-centered care and serving as a compassionate and transforming healing presence within the communities they serve. As a not-for-profit health system, Trinity Health reinvests its profits back into the communities and is committed to addressing the unique needs of each community.

In Fiscal Year 2022, Trinity Health contributed \$1.4 billion in community benefit spending to aid those who are vulnerable and living in poverty, and to improve the health status of the communities in which we serve. Community benefit activities are intentional and strategic, and include addressing the social influencers of health identified in the community health needs assessments.





Benefiting over 152,000 patients, who could not afford health care services due to inadequate resources and/or are uninsured or underinsured, 64% of which were from priority ZIP codes. Trinity Health defines priority ZIP codes as communities of people who have at least one of the following characteristics: (1) at least 40% of the population in the community is Black or Latinx/Hispanic; or (2) the median earnings for the community are at or below 200% of the federal poverty guideline (\$55,500 for a family of four) or the Housing and Urban Development low-income definition of 80% of Area Median Income. Of the \$192M in Financial Assistance, 44% was for emergency care.



\$417M: Programs for those who are poor and underserved, and for the broader community

Programs or activities, for those who are poor and for the broader community, that provide treatment and/or promote health and healing as a response to an identified community need can further be broken down into the following subcategories:

\$215M Health Professionals Education **\$92M** Subsidized Health Services

\$53M Financial & In-Kind Contributions

\$35M Community Health Improvement Services

\$14M Community Benefit Operations

\$5M Research

\$3M Community Building Activities

It Starts Here COVID-19 funding: \$1 million



Trinity Health invested in a second round of funding to continue community engagement and mobilization efforts around making the COVID-19 vaccination accessible to all eligible populations, ensuring easy and equitable access to the vaccine by removing barriers for all people to receive the vaccine, especially communities that have less than 75% vaccination rate. Local CHWB teams collaborated with community partners to facilitate/administer vaccines in non-clinical settings, such as:

- Community festivals
- Back-to-school events
- Pop-up clinics/mobile units
- Restaurant staff/State restaurant associations

- In-home for those who are homebound
- Housing complexes
- Laundromats
- Construction sites

Facilitated

3,200 COVID-19

vaccine events

Administered 80,000 COVID-19 vaccine doses



Reached

874,000

people with educational material on COVID-19 and the benefits of vaccination Holy Cross Health (Silver Spring, Maryland) partnered with their local school district and the county's Department of Health and Human Services. Multilingual flyers were created to promote the clinics and benefits of vaccination. In FY22, these clinics provided 2,532 vaccines at 42 clinics.





Saint Alphonsus (Idaho/Oregon) invested in a fleet of vehicles and staff to take into community to serve those who would not otherwise have access to COVID-19 vaccines, including local homeless shelters, regional farms and dairies, schools, people's homes, and within very rural communities. In FY22 the mobile vaccine teams provided 1,700 vaccines and educated 629 individuals at more than 152 clinics/events.



Saint Agnes Medical Center (Fresno, California) much effort was focused on rural communities with limited access to care. In FY22, 82 clinics provided 3,300 vaccines and educated 8,500 individuals.

Community Grants: \$1.6 million



Community Grants supported 35 projects across ten regional health ministries to directly align interventions and local partnerships identified in their Community Health Needs Assessment (CHNA) Implementation Plans.



Food access: \$380,000

Mental health: \$270,000

Transportation: \$220,000

Housing/Homelessness: \$160,000



"This program means so much to my family and me. I don't know what I would have done without the services and support I have been provided."

- Ms. G, SOS -Parents as Teachers

Trinity Health Michigan (Ann Arbor) addressed inequities and racism in maternal and infant care by:

- Providing free virtual prenatal education classes for 500 women (and their partner) in the priority zip codes, including topics such as breastfeeding and "what to expect" taught in a welcoming and supportive group setting
- Providing funding to cover the costs of over a dozen births and other pregnancy, parenting/bonding, and postpartum support through the Michigan Prison Doula Initiative
- Working with 45 families through the SOS Parents as Teachers program, many who have an especially high number of risk factors for abuse, neglect, and developmental and health problems



Trinity Farmbox (Trinity Health Mid-Atlantic) - partnering with local faith leaders, safety net health centers and senior community services, to improve access to fresh produce. In FY22, Trinity Farmbox provided 2,332 boxes of healthy fruits and vegetables serving 4,664 households, also supporting a local farming co-operative.



Youth Mental Health Coalition (Trinity Health Of New England - Springfield) brought together two groups of youth to strategize about mental health with their peers. Collaborating with about 20 youth, a mental health campaign launched in conjunction with Back-to-School events for Springfield Public Schools reaching 5,000+ youth.

Transforming communities initiative: **\$1.1 million**



Round 2 of the Transforming Communities Initiative (TCI) is a 5-year, \$1.1 million initial investment in an innovative funding and technical assistance initiative, partnering with community-based organizations and residents to develop and implement evidence-based strategies that advance health and racial equity through addressing root causes of poor health identified in the regional health ministry's most recent CHNA Implementation Plan, or emergent community-identified need. The following are the core members of TCI and the role they serve:

Trinity Health: Inspires innovation, supports local implementation and finances the initiative; convenes all TCI partners.



National Evaluation: Designs national evaluation framework and measurement; leads cross-site evaluation, multi-sector collaborative assessment and standardizes reporting across all TCl communities.

National Technical Assistance (TA) Providers: Serves as an extension of Trinity Health CHWB; provides localized TA, develops and delivers training and on-going support for TCI communities.

TCI communities: Nine communities that are 40% or more Black or Latinx/Hispanic and impoverished, committed to advancing health and racial equity. Key partners – regional health ministry, community residents, community-based organizations, and stakeholders working together to make measurable impact.

Lead Community-Based Organization: Convenes multi-sector collaboration, co-leads the development and implementation of the Community Action Plan, provides fiscal management for all partners.

Local Evaluator: Develops local evaluation plan, supports design of local implementation strategy; leads data collection, local reporting and publications, contributes to National Evaluation.



Transforming Communities Initiative Regional Health Ministries

Holy Cross Health, Ft. Lauderdale, FL

Loyola Medicine, Maywood, IL

Mercy Medical, Springfield, MA

Nazareth Hospital, Philadelphia, PA

St. Agnes, Fresno, CA

St. Francis, Wilmington, DE

St. Mary's, Waterbury, CT

St. Francis, Hartford, CT

Trinity Health Michigan - Oakland, Pontiac, MI

Community Investing Program: \$17.8 million in new investments



In addition to the \$1.4 billion in community benefit spending, our Community Investing Program had the most robust year of lending since the program's inception over 20 years ago, including:

- \$17.8 million in new loans
- \$8.3 million in loan renewals were approved focusing on building affordable housing and increasing access to education in partnership with our Regional Health Ministries
- \$7.7 million in repaid loans and discontinued lending

Total Loan Portfolio: \$56.4M



Housing: \$28.4M



Facilities: \$9.8M



Education: \$10.1M



Economic Development: \$6.6M



Food: \$1.5M

Trinity Health Partner Census (2018-2022): Insight into the overall impact generated by investments - for every dollar that Trinity Health has deployed over the last five years, it has yielded \$8.28 in investment for our service areas and priority populations.



\$40 million in deployed lending from Trinity Health





More than \$330 million in investment in our communities (\$215 million supported

high priority ZIP codes*)



4.900 units of affordable housing including 225 supportive housing beds



180 childcare slots

1.500 k-high school education slots

1.500 early childhood education slots



1.2 million square feet of general real estate



2.300 full and part time positions



McAuley Park Affordable Housing Development in Atlanta, Georgia (\$4M)

Boise State University Scholarship Loan Program Video in Boise, Idaho (\$3M) -Since 2014, 750 students have received just over \$2M in



scholarships through the Fresno State and Boise State scholarship funds.

Healthcare Anchor Network Case Study: Trinity Health Community Investing

Overview of the program and supporting projects that reduce social and economic disparities that cause unequal health outcomes for minority and low-income communities.



Focus areas include advancing access to higher education; fair and affordable housing; economic development and empowerment; and access to healthy, affordable food.

Access the Case Study here.

^{*}defined as racially/ethnically-diverse communities with high levels of poverty

Safety Net Health Centers



In healthcare, a "safety net" involves medical providers serving our lowest-income and most vulnerable communities including individuals and families who receive Medicaid, are uninsured or are underinsured. A healthcare safety net strives to make healthcare accessible to everyone.

At the start of the 2022 calendar year, CHWB and Trinity Health Medical Group partnered together and identified the following six tactics to improve outcomes at Trinity Health's 60 safety net health centers (SNHC) over the next three years:

- Establish hours of service to meet needs of populations served
- Provide enrollment assistance, language access services, mental/behavioral health screening and social needs screening and referral
- Ensure all contracted insurance types are accepted, including Medicaid
- Implement standard scheduling templates to enhance access
- Set-up and create standard billing practices
- Implement framework for optimal provider efficiencies

Additionally, an interdisciplinary advisory team was established to provide recommendations and feedback to promote health equity by enhancing sustainable access to care for those who are experiencing poverty and other vulnerabilities through improving patient/provider satisfaction, financial sustainability, and quality of care at SNHCs. The 20-person team brings together colleagues quarterly from across the system representing multiple departments including SNHC staff, Community Health & Well-Being, Medical Group, Population Health, Mission, Diversity, Equity & Inclusion, and Advocacy.



Mercy Primary Care (Detroit, Michigan) - The St. Frances Cabrini Clinic, America's oldest free clinic, serves one of Detroit's most vulnerable communities and was featured by Catholic Health Association, in this <u>video</u>. Under the management of Trinity Health Michigan since 2018, Cabrini Clinic provides completely free medical care and connections to a variety of wrap-around services to ensure social needs are addressed.



Nine RHMs are collaborating with the National Diabetes Prevention Program (DPP) through a CDC's cooperative agreement to embed a .5 FTE Community Health Worker (CHW) into SNHCs. The CHWs will help with pre-diabetes education, outreach and enrollment, and delivery of the DPP Lifestyle Change Program. Additionally, CHWs will address patient social needs by connecting them to social care programs and assist with enrollment into the RHM's financial assistance program, Medicaid, and local health plans.

Community Health Workers



Addressing Patient Social Needs

Community Health Workers (CHWs) are an essential member of the clinical care team advancing social and clinical care integration. They serve as liaisons between health/social services and the community to address patients' social needs and mitigate barriers to health. Because of their lived experiences, CHWs are trusted members of the community and work closely with a patient by assessing their social needs, home environment and other social risk factors, and ultimately connect the patient (and their family) to services within the community.

All of Trinity Health's 128 CHWs and 14 CHWs from community-based partner organizations, had access to 40+ hours of foundational CHW training and chronic disease-specific training. This coming year, we will continue to clarify top-of-license roles of care team members, improve our reporting capabilities through optimization of TogetherCare - Trinity Health's electronic health record - and leverage CHW expertise to meet patients where they are, and engage those most in need of support.

Partnering to improve outcomes for those enrolled in the Medicare Shared Savings Program

One of the greatest successes in fiscal year 2022, was the collaborative relationships developed between regional Clinically Integrated Network (CINs), Trinity Health Medical Group and Community Health & Well-Being (CHWB) teams to reduce preventable hospitalization for those dually enrolled in Medicare and Medicaid. This is the first and most important step for how we integrate social and clinical care. Lessons were learned about managing shared staff, patient stratification, patient engagement, integrating CHWs into care teams and within Safety Net Health Centers, standardizing social needs screening and referral paths, and TogetherCare use.



Holy Cross Health (Ft. Lauderdale, Florida)

Ms. Evans was referred by her physician to Mimi, a Community Health Worker (CHW), due to "non-compliance" with her medical appointments. Mimi contacted Ms. Evans and found that she was focused on

helping her mother after a cancer diagnosis and did not have transportation to her appointments.

Mimi visited Ms. Evans at home where a social needs screening revealed she also needed assistance with medical needs and food.

Mimi dropped off a medical transportation form at her doctor's office and found the doctor unwilling to sign because "the patient does not keep her appointments." Mimi explained the situation and promised that Ms. Evans would attend her next appointment. The doctor agreed and signed the medical transportation form. Mimi scheduled Ms. Evans for her appointment and accompanied her to that appointment where her doctor ordered a home health nurse, a rolling walker and an orthopedic appointment.

Ms. Evans later called Mimi to share how happy she was Mimi came into her life.

Screening for **Social Needs**

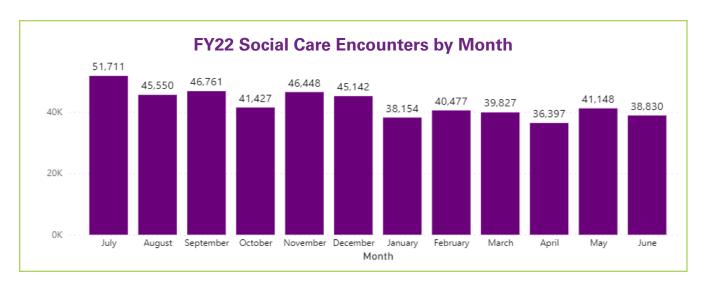


TogetherCare - Trinity Health's electronic health record, powered by Epic - has made it possible for Trinity Health to standardize screening for social needs and connect patients to community resources through the community resource directory, community health workers and other social care professionals. Across the system, 55% of patients seen in primary care settings were screened for social needs. Continuous process improvement and the formation of local ambulatory and acute workgroups have contributed to this progress.



CHWB developed educational and training materials and partnered with Trinity Health Medical Group to educate and raise awareness around social needs. and are actively working to strengthen the follow-up

process through the use of the Community Resource Directory, community health workers and other social care colleagues.



COMMUNITY BENEFIT



MercyOne Northeast Iowa identified transportation as a barrier to accessing care for many community members. In response they launched Care-A-Van, which provides free transportation for patients to their appointments, and currently has 20 volunteers and employs a part-time colleague to support scheduling. In Fiscal Year 2022, Care-A-Van transported 1,745 patients to medical appointments.



Mount Carmel Street Medicine & Social Care Teams (Columbus, Ohio)

Cheryle and her partner Ben were struggling to eliminate barriers to care over the past several years. Cheryle, who's been living unsheltered, needed wound care,

primary care, and substance use disorder treatment. She also needed help obtaining an ID and permanent housing. Then, Ben passed away, and what she really needed was grief support. Street Medicine Nurse Paige and Community Health Worker Karen planned a celebration of life for Ben at Cheryle's camp, and continues to work with her to get the resources and care she needs.

*FY22 YTD

Community Resource Directory



Trinity Health's Community Resource Directory, powered by findhelp, is an online portal connecting those in need to free or reduced-cost health and social service resources within the community and across all Trinity Health locations.

In fiscal year 2022, the Community Resource Directory yielded over 60,000 searches, an 8% increase from the previous year. Over 1,500 referrals were made, and 160 community partners claimed their organizations. This represents a 120% increase from the previous year of 70 organizations that claimed their programs. Claiming allows community-based organizations to take ownership of their programs on the platform to maintain its information and indicate how they would like to be contacted. This could be directly on their website, emails, direct phone calls or direct referrals on the platform, which supports a closed-loop referral workflow.





https://communityresources.trinity-health.org

Ministries engaged over 300 organizations through one-on-one sessions, health ministry-led trainings and collaborative work with other findhelp partner organizations.



Several barbershops near **Saint Joseph Health System** (Indiana) hung Community Resource Directory informational posters on their business doors.



Trinity Health Of New England (Massachusetts/Connecticut) launched patient self-screening using tablets in medical offices, allowing easy access.

Diabetes Prevention Program



Five Years of Delivering and Optimizing Enrollment into the National Diabetes Prevention Program (DPP)

Trinity Health operates DPP in 10 RHMs through a 6-year, \$8.4 million grant from the Center for Disease Control & Prevention (CDC). The goals of the program are to increase the number of DPP delivery sites, standardize clinical screening and detection, raise awareness and enrollment, maintain retention rates, and seek benefit coverage. Since September 2017, over 5,000 people have enrolled in DPP, with an average weight loss of 4-5%, meeting the CDC program goal of 4-7%.

Trinity Health delivers DPP both in-person and virtually, offers Spanish only classes, and has seen success through outreach and referral mechanisms in Trinity Health's electronic health record - TogetherCare - including:

- Adoption of a system-wide clinical workflow that allows providers to determine a diabetes prevention route either via DPP or using other evidence-based approaches
- Group documentation in real time
- Reports and analytics dashboard
- Outreach letters to patients who qualify for DPP

Additional accomplishments over the past 5 years include:

- Two RHMs received Medicare DPP supplier status and other RHMs are in the process of applying for MDPP status
- Partnership with American Medical Association (AMA) for provider education and support around DPP, and to analyze the DPP return on investment on a future collaborative project
- A new 5-year partnership with Northwestern University, funded by CDC, to advance chronic disease prevention knowledge nationwide



"When I started taking care of my situation about two and a half years ago, one of the people that motivated me was my brother, who was diabetic. He's had many health issues and it turns out that he needed a kidney. So less than three weeks ago I donated my kidney to my brother. When I started this program I would have not cleared even the initial qualifications to be a donor. But over time, I've gotten to the point where I was healthy enough that I could contribute and I did."

 Glenn Parks, patient Holy Cross Health (Florida)



In collaboration with Innovated Health Alliance of New York, **St. Peter's Health Partners** (Albany, New York) integrated the DPP risk test into Pharmasmart machines located in 70 grocery store pharmacies. Based on their risk test score, patients have the opportunity to be directly referred to the program.

Impacting Social Influencers of Health



Leveraging Investor Power to Catalyze Corporate Social Responsibility

Our shareholder advocacy work focuses on addressing structural racism across five strategic areas by holding corporations accountable for negative impacts on people and the planet. In fiscal year 2022, Trinity Health facilitated over 135 Shareholder Advocacy Engagements, with great success. Examples include:

- Five Below committed to assess and manage the risks/hazards associated with chemicals of high concern contained in their private label products
- Unilever agreed to stop food and beverage marketing to children under age 16, and will
 adopt new targets to reduce salt, added sugars and calories, and increase sales of their
 healthier products
- Pepsico set goals to increase positive nutrients in their products
- PDC Energy accelerated its goal to end routine flaring of methane, from 2030 to 2025, thus reducing environmental health risks and greenhouse gas emissions

Additionally, Trinity Health and other members of the Interfaith Center on Corporate Responsibility (ICCR) Gun Safety Group, submitted a shareholder resolution asking Sturm Ruger, one of the nation's leading manufacturers of firearms, to conduct and publish an independent human rights impact assessment of its policies, practices and products, and make recommendations for improvement. The resolution received a 68.5% vote in favor, well above the threshold required for the resolution to be resubmitted in 2023, indicating a large majority of Sturm Ruger investors believe the company has to address its human rights impacts. Trinity Health and Trinity Health Of New England are cited as part of the group who moved forward this resolution.



Saint Joseph Health System (Indiana) celebrated 13+ years as lead agency for Tobacco Prevention & Cessation services in St. Joseph County and 7+ years in Marshall County, working against the tobacco industry's influence through advocacy, social alteration, and policy change.



Trinity Health Michigan - Muskegon facilitates or provides leadership for several coalitions focused on healthy lifestyles, the promotion of advance directives, prevention of youth alcohol, tobacco, marijuana and opiates use in West Michigan. These coalitions convene more than 140 people monthly to decrease binge drinking, decrease easy access to drugs and increase positive behavioral supports. In the past 10 years, these data-driven decision-making teams have:

- Reduced youth use of alcohol by 55%
- Reduced youth use of tobacco by 47%
- Reduced youth drinking and driving by 61%
- Collected more than 48,000 pounds of unused medications in Muskegon County







Trinity Health FY22

COMMUNITY HEALTH & WELL-BEING IMPACT REPORT

