Promoting and Leading Catholic Identity

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Presentation Overview

• Institutionalizing Catholic Identity
• Catholic Identity as Foundation for Ministry Formation and Incorporation
• Assessment of Catholic Identity
• Questions and Answers

Presentation Objectives

• Discuss ways in which Catholic social practices (sensibilities) can be applied to health ministry
• Discuss criteria that can be used to assess Catholic Identity
• Describe elements of a ministry formation program that strengthens Catholic identity
Emergence of PCI and LCI

- Trinity Health’s Journey
  - Institutionalize Catholic identity?
- Merger
- Assessment
- Functional work groups
- Design teams

Rethinking Formation

EXECUTIVE CORE CONTENT

- Heritage & Tradition
- Mission and Values
- Vocation
- Spirituality
- Catholic Social Teaching
- Organizational & Clinical Ethics
- Servant Leadership
- Holistic Health Care
- Diversity
- Church Relations
- Content

Right Content?
Relevance?
Will this institutionalize?

CHA Catholic Identity

Therese Lysaught’s

“Caritas in Communion”
Method for Incorporation

- Leadership Academy
  - Succession & Talent
  - Excellence:
    - Transformation
    - Operations
    - Ministry
- Method
  - Real time cases
  - Layering

Rethinking Assessment

- How do formation and assessment align?
  - Teach to test?
  - Test to teach?

Leading Catholic Identity

**A Model of Ministry Formation**

- Trinity Health embraces 5 Core Values
  - Reverence - Justice
  - Stewardship - Integrity
  - Commitment to Those Who Are Poor
- Utilize Catholic sensibilities as way to both reinforce Catholic identity and provide practical applications of the Core Values
Catholic Sensibilities

Sensibility:
• Attitude toward the world;
• Ability to appreciate and respond to complex cultural and practical influences in a distinctively Catholic way.

Understanding and Incorporating the Sensibilities

• Begin with personal experience
• Use “tradition” to inform experiences
  – Identify the biblical roots, both Old Testament and New Testament
  – Examine papal teachings in light of socio-political situation
• Interpret sensibilities within current situation
• Three-part focus:
  – Those We Serve
  – Those with Whom We Serve
  – The Community We Serve

An Example

Core Value:
Commitment to Those Who Are Poor

Sensibility:
Preferential Option for the Poor
Biblical Foundation:
Old Testament

- **Anawim**
  - “Bent ones”
  - Outcast
  - Not just materially poor
  - Widows, orphans, collectors and sinners
  - Outcasts; suffered economically and socially
  - “Faithful Remnant”
  - Special Trust in God’s mercy
- God of Israel has clear bias for the poor

Biblical Foundation:
Old Testament

- Torah: Covenant Community
  - Equal treatment, justice, respect
  - Religious and social laws provide for poor
- Psalms and Proverbs
  - Helping poor = righteousness
  - Lord is refuge for poor; raises up the lowly
- Prophets
  - Exhort community to defend and protect poor
  - Announce that the Lord will vindicate the poor

Biblical Foundation:
New Testament

- Mary and Joseph are “anawim”
- Messiah born in a stable; feeding trough for a cradle
- Public ministry: frequently reaching out to the outcasts, those on fringes (“anawim”)
- Miracles, healings, forgiveness
- Preaches the Reign of God
Throughout the Centuries

- Apostolic Tradition
- Early Christian Communities
- Witness of Saints
  - Francis of Assisi
  - Vincent de Paul
  - Theresa of Calcutta
- Role of Catholic health care, education and social ministries

Catholic Church Teaching

*Rerum Novarum* (1891) Leo XIII

- All people must play an ACTIVE role in caring for the poor among us
  - Prevent exploitation of poor workers.
  - Promoting “social justice”
  - Being a prophetic voice for the poor and marginalized
  - Challenging authority
  - Promoting authentic human development of all people

*“Economic Justice for All”*

U.S. Catholic Bishops, 1986

- Persons who are poor and/or marginalized have privileged claims IF we are to be a just society.
- As individuals and as a nation … we are called to make a fundamental option for poor and vulnerable persons.
- The obligation to do so … arises from Jesus’ radical command to love one’s neighbor as one’s self. This obligation is deeply rooted in Christian belief.
Preferential Option for the Poor

- Embracing an option for the poor and vulnerable persons means …
  - Commitment to resist all forms of oppression
  - Working for the transformation of society so that the dignity and rights of all can be realized

Characteristics

- Preference for worst-off
- Treating them as subjects not objects
- Enabling them to experience their dignity
- Creating the conditions so that they might exit their poverty
- Solidarity

Those We Serve

- Financial counseling
- Health literacy
- Intensive case management
- Behavioral health
- Expanding equitable access
Those with Whom We Serve

- Tiered benefits
- Emergency funds for colleagues
- EAP
- Mitigating outsourcing issues

The Community We Serve

- Addressing disparities
- Advocacy for social justice issues that are determinates of health
- Community needs assessment
- Vulnerable populations (e.g., behavioral health, undocumented, human trafficking)

PCI and Baldrige

- Malcolm Baldrige Award
- Healthcare Criteria for Performance Excellence 2013-14
- Goal: Institutionalize Catholic identity through management practices/structures
PCI and Baldrige

<table>
<thead>
<tr>
<th>Baldrige</th>
<th>Trinity</th>
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<tbody>
<tr>
<td>1. Leadership</td>
<td>Leadership</td>
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<td>2. Strategic Planning</td>
<td>System Design</td>
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<td>3. Customer Focus</td>
<td>Measurement, Analysis &amp; Education</td>
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<td>4. Measurement, Analysis, &amp; Knowledge Management</td>
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<td>5. Workforce Focus</td>
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<td>6. Operations Focus</td>
<td>Those who we serve</td>
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<td>7. Results</td>
<td>Those with whom we work</td>
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<td>The Community</td>
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Process & Content

- Leadership
- System Design
- Measurement, Analysis & Education
- Operations
- Impact

Caritas
Dignity
Common good
Solidarity
Care of Those Who Are Poor
Stewardship
Subsidiarity, Participation, & Association

Leadership

Board and senior management
- Communication
- Modeling
- Accountability/incentives
System Design

Core documents

• Where does it show up?
• Widely communicated?
• Action plans?

Measure, Analyze, and Educate

• Internal/external measures?
• Analysis?
• Education?

Operations

• Institutional saturation?
• Responsiveness?
• Total quality improvement?
Impact
• Benchmarks?
• Trends?
• Institutional impact?

Scoring
• No action
• Initial
• Repeated
• Defined
• Managed
• Optimized

Method
• Stable facilitators/listeners
• Books: Sensibilities & Process
• Document collection
• BoardEffect
• Webinars
• Timeline
• Managing anxiety
Successes

• Formation: Language shapes Reality
  – Mission leaders
  – Leaders
  – Institution
  – Trinity Health
• Continuing care

Opportunities

• 3-year cycle bandwidth
• Scoring
• Phases 2 & 3
• Integrate PCI with LEAN?

Who has the first question?