

A PATHWAY TO FRANCISCAN EXCELLENCE

*A Louisiana Health Care System Creates a Process for
Developing Leadership across the Work Force*

In 1911, six sisters, members of the Franciscan Missionaries of Our Lady, laid the foundation for what is today the FMOL Health System (FMOLHS), which includes five acute care hospitals and covers three major Louisiana markets. Today, more than 6,500 lay men and women partner with the sisters in caring for the sick and poor of Louisiana.

Over the past four years, our system, together with the sponsoring congregation, has been engaged in increasing our work force's understanding of the values, charism, and tradition of our sponsor and the mission and identity of the health system. We believe this increased understanding will ultimately be reflected in the behaviors of the committed women and men who, in myriad ways each day, touch the lives of patients, family members, coworkers, and others, both inside and outside our institutions.

REARTICULATION OF IDENTITY

The first phase of this process involved a rearticulation of our identity. We developed a mission and core values statement that is now shared by the entire health system. We designed and introduced a common logo for all system members. To communicate the new, simpler, clearer mission statement, John J. Finan, the system's CEO (and one of this article's authors) and Sr. Brendan Mary Ronanyne, OSF, the former provincial of the Franciscan Missionaries of Our Lady, traveled around the system giving a total of 30 presentations on the statement to physicians, employees, and board members.

Following that, a special task force addressed two sponsor priorities—mission integration and leadership development. Supporting our work in this phase, we had the benefit of an excellent history of the sisters' ministry, compiled by Lyn

Pesson, PhD. This history was a valuable reference for the group of long-term employees and sisters who served as task force members. This group, after reflecting on the history and tradition of the sisters and of the church, drafted a set of organizational mission standards and individual behavioral competencies for all FMOL employees. The group deliberately created these two documents so that they would parallel each other, organizing them around the same categories and demonstrating the interrelationship between desired organizational and individual behaviors.

Both the mission standards and competencies were presented to various groups of sisters, executives, and employees throughout the system for reactions. A final draft was then reviewed and revised in a systemwide planning meeting in October 2001. Finan and Sr. Barbara Arceneaux, OSF, the current provincial of the Franciscan Missionaries of Our Lady (and another of this article's authors), are now visiting the leadership teams of the hospitals, presenting the competencies and discussing how they will be implemented.

The task force was aided, during the development of the competencies, by a consultant named Valerie Oberle. Oberle, a former director of the Disney Institute, Orlando, FL, had created and implemented developmental processes for employees at Disney theme parks in the United States and Europe. At FMOLHS she helped the task force articulate the behaviors that demonstrate our mission—"What it looks like everyday," as she put it. Oberle also helped us understand how these behavioral competencies could be developed and has identified a number of processes for such development.

FMOLHS COMPETENCIES

As Sr. Barbara has said, "Every one of our employees is a leader. They lead by extending the

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healing ministry. Leadership is about what you do, but it is also about how you do it." As we addressed our sponsor's dual concerns for leadership development and mission integration, we articulated competencies for all persons who serve in our ministry, not only those with management responsibilities.

These competencies we organized into three clusters. In describing each cluster, we sought to connect it with the core values of the system, as well as with church teaching.

Foundational Competencies FMOLHS employees should know, live, and advance our mission through their actions and joyfulness of spirit. As FMOLHS's statement regarding these competencies puts it, "Our organization exists to bring the healing ministry of Jesus Christ to all those we serve with joy, love, justice, and humility. Ours is a spiritual and prayerful organization. People of all faiths can and do contribute to this mission by the manner in which we go about our daily tasks. The history and tradition of the church and of our founding sisters provide the necessary guidance for our mission. It is our task to continue this mission by being faithful to this tradition in our words, our actions, and our spirit."

FMOLHS describes these competencies as "Relies on Spiritual Grounding" and "Demonstrates Integrity."

Service Competencies In all interactions and daily activities, employees should demonstrate care, courtesy, respect, and loving concern for all others. "One aspect of creating a healing and spiritual presence is the ability to be hospitable and to treat everyone with dignity and respect and as one would treat a guest. Each of us is part of the 'spirit' of the organization as such, and each of us contributes to that spirit by the attitude with which we go about accomplishing our daily tasks. Employees must be friendly, courteous, approachable, and helpful. We accomplish this by our genuine concern, service, and willingness to help; by demonstrating joyfulness while completing daily tasks; by building relationships with our coworkers; by working together as a team to accomplish our goals; and by celebrating those accomplishments."

FMOLHS describes these competencies as "Extends Hospitality," "Builds Relationships," and "Responds to Needs."

Stewardship Competencies Employees should use their gifts, talents, and the resources of the organization to advance our mission. "Through prudent stewardship, we take responsibility for advancing the healing ministry of Jesus Christ in such a way that our core values can be seen in our actions. Our individual performance impacts the mission and financial performance of the organization, by

the use of our gifts and talents. Organizational and individual efforts must connect back to the care of those most in need, demonstrating reverence and love for all of life. Measuring our performance is an important part of stewardship. Seeking continuous improvement is our responsibility. We seek improvement and work to find better and more efficient ways to be of service to our customers, each other, and our mission."

FMOLHS describes these competencies as "Sustains Priorities," "Seeks Excellence in Performance," and "Achieves Measurable Results."

LEADERSHIP COMMITMENTS

The three clusters above describe the competencies as professional commitments that all of us make, regardless of position, as participants in this healing ministry. But FMOLHS has also recognized the impact that those who lead others—including those who lead leaders—have on the organization's ability to fulfill the mission. Therefore, we have articulated additional commitments for those who lead teams of people and for those who lead other leaders. The first series applies to leadership in general. An FMOLHS employee is expected to:

- Recognize religious objects and treat those belonging either to patients or to the organization with dignity and respect
 - Attend the facility's religious services and celebrations or cover for other staff members so that they can do so
 - Stop and remain silent during prayer over the loud speaker and in meetings
 - Attend in-services related to mission, history, tradition, and the *Ethical and Religious Directives for Catholic Health Care Services*
 - Demonstrate an ability to make pastoral care referrals and ethics consultations (this commitment may apply to clinical staff only)
 - Be able to locate for patients, families, and visitors the facility's prayer rooms and chapels, and its schedule of religious services
 - Be able, when asked to do so, to explain how his or her work contributes to the mission of the organization
- Additional commitments have been developed for those who lead teams. A team leader:
- Ensures that meetings begin with a prayer or reflection
 - Creates and maintains a schedule that allows team members to attend in-services and rituals within the organization
 - Encourages and supports all those employees, of whatever faith, who wish to share their talents by participating in organizational rituals and in-services

- Aligns all decisions, priorities, and actions with the mission and core values of the organization

- Follows Catholic teaching in decision making
- Creates an environment that nurtures integrity in others

And, finally, still other commitments have been developed for those who lead leaders. A leader of leaders:

- Enhances Catholic identity by ensuring, promoting, and funding the resources needed for the spiritual needs of the organization (i.e., staffing pastoral care, celebrations, space and time for prayer and reflection, and other services)

- Ensures that prayer is an integral part of the life of the organization

- Fosters and promotes vocational awareness throughout the organization

- Utilizes the guidelines for values-based decision making throughout the organization

- Can articulate current organizational activities, opportunities, and challenges in relation to the organization's history and tradition and its mission and core values

- Is knowledgeable of, can interpret, and strives for alignment of current organizational activities, opportunities, and challenges in conjunction with the core elements of Catholic identity, the social teachings of the Catholic Church, and the *Ethical and Religious Directives for Catholic Health Care Services*

"MY PATHWAY TO FRANCISCAN EXCELLENCE"

With the introduction of a "360-degree" assessment tool, FMOLHS has made the competencies operational in a system we call "My Pathway to Franciscan Excellence." At present, we have piloted the assessment with executive leaders only. Eventually, the competencies will be integrated into performance evaluations for all employees, whether through 360-degree assessment or other methods.

To create an assessment tool that articulates specific behaviors and measures of behaviors for each of the competencies, FMOLHS turned to a consulting firm, Strategic Programs, Inc., Denver. For example, for the competency "Relies on Spiritual Grounding," one behavior is "Finds personal meaning in work." The measures of this behavior are:

- Exemplifies a personal commitment to serve
- Demonstrates that his or her work activity is more than just a job

- Acts unselfishly to exemplify our values

Our competency assessment will be complemented by development planning for fulfilling

development plans. We have already developed several online educational modules intended to help people enhance their level of ability in the competency "Relies on Spiritual Grounding." One module teaches skills in leading prayer at meetings, for example.

EARLY STRUGGLES, EARLY WINS

Competency assessments began in the spring of 2003. Less than a year after introducing the competencies and the assessment tool, we can point to some early difficulties, as executives struggle to apply it to their individual experiences, and to some early successes as well.

Executive leaders who have participated in the 360-degree assessment have struggled with generating development plans that respond to the feedback they receive from the assessment. Planning their own professional development is a different discipline than the planning they perform for their organizations—typically problem solving, such as how to reduce days in "accounts receivable." Many of our executives did not know, at first, what kind of activities could be pursued toward fulfilling their development plans and increasing their competency levels.

But the leadership development system is delivering some early positive results, too. Primarily, the benefit has been in the conversations that are now occurring: intentional conversations about how we set expectations for performance excellence. We are engaged in many more of these conversations than in the past, and awareness of what is expected of each of us as leaders is much higher.

Sr. Barbara reminds us that the expectations of our sponsor are high. "Our founder, St. Francis, lived by the values of Christ, and we try to portray those values to our employees," she says. "We expect our employees to do their best to live out those values." "My Pathway to Franciscan Excellence" provides all FMOLHS employees with a clear articulation of the behaviors they are expected to live out, in accordance with those values, along with tools for measuring their achievement and tools for development.

As for FMOLHS leaders, "My Pathway to Franciscan Excellence" is supporting them as they develop leadership behaviors. "It causes leaders to be mentors of the values," Sr. Barbara says. "Mentoring is a word I believe in strongly. If, as a leader, I'm not a mentor, then I've missed my calling." □

For more information on "My Pathway to Franciscan Excellence," contact Cindy Heine at cheine@ololrnc.com.