

Engaging Caregivers Through Mission and Values Review

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Leaders of today's Catholic ministries are entrusted with an organizational responsibility to promote, sustain and remain true to Christ's healing ministry and the Catholic tradition of caring for and nurturing people in need. Mission integration is a dynamic process that sets the context for the ministry of service, embedding mission into organizational practices, policies, structures and decisions and formally socializing people into a collective culture of mission and service.

Mission assessment offers a tool for insuring the organization is making its mission real and living it every day. It is not a new phenomenon, but during this time of changing health care models, many organizations have been adapting their mission assessment processes to reinvigorate the commitment to their Catholic identity and mission.

Since 1999, PeaceHealth, based in Vancouver, Washington, has conducted a mission and values review process in alignment with its status as a pontifical private juridic person. The sponsors have delegated the process to members of the mission services team and Sisters of St. Joseph of Peace who compose the review team. After more than 15 years of trying a variety of other, less engaging processes, PeaceHealth believes it has developed an integrated approach that furthers the mission through the assessment process itself. The key shift in our thinking: recognizing that the review process is, in and of itself, a mission integration opportunity.

RETHINKING THE REVIEW

Mission and values review processes are a common part of an annual or semi-annual commitment to assess, as accurately as possible, the degree to which caregivers throughout the organization are buying in and giving witness to the organization's mission and values.

Assessment and planning can be sterile activities designed to simply measure outcomes, or

they can be energizing experiences that inspire people to higher goals and a common purpose. Mission assessment, aligned with mission integration, can be an effective method for identifying and responding to the inherent call of what it means to be a ministry for our time.

At PeaceHealth, the review exercise gradually had become cumbersome, burdened by both the magnitude of change in health care and a decline in resources available to help staff the assessment process. In addition, the traditional approach often missed the opportunity to grow and deepen caregiver enthusiasm and engagement. Sometimes the mission and values review devolved into conversations focused on what's wrong, rather than engaging caregivers in seeing the strengths that they bring to their service. Review forums frequently involved silo gatherings — leaders met separately from caregivers, which meant lost opportunities for listening to one another. At worst, one or two of the loudest voices dominated the review forums. The process gathered plenty of data but did little to garner engagement and commitment.

TRANSFORM THE TRADITIONAL

In 2014, PeaceHealth developed a new process to deepen affirmation, pride and meaningful engagement. As Catholic health care leaders, we are responsible for assessing the degree to which the stated mission and supportive values are lived and engaged, not just in word but also in

presence and service. The process set out to reinforce the culture we were nurturing and seeking to measure. Our sponsors wanted to know:

Are our people feeling effectively drawn and committed to the mission?

Do our people know the why of what we do, and is it important to them?

Are our caregivers loving, trusting, caring and compassionate with not only others, but also themselves?

Are they expressing those qualities in how they engage with patients, family and with colleagues?

Stories illuminate the answers to these questions, and we have found that an effective mission and values review process gathers stories of mission and values in action. These stories are actual expressions of the tradition out of which we come, and they authentically give voice and make tangible the face and grace of love in the everyday ministry of giving care. Although conducting such a review process at each site in the system is labor intensive in both preparation and execution, we find the whole experience to be significantly informative and engaging. It has offered

us insights to expressions of compassion — love in action — being lived throughout the system. The effort it takes is well worth the expenditure of preparation and process time, as it offers the opportunity for formative dialogue, relationship building, recognition and insights into the need for adjustment and operational support at multiple levels of the organization.

These are the key elements that provide an important backdrop for the process as a whole:

Online survey for self-reflection: Before the mission review team visits a site, caregivers are offered an anonymous, online survey that allows them to answer a series of questions about key

Review team members have packets full of rich details that give them a picture of mission integration at each facility.

elements of the PeaceHealth Catholic identity statement. The results are shared as part of the on-site reviews to generate further discussion. The results give insights into how caregivers perceive their relationship with the PeaceHealth mission and values. Also, participating in the anonymous survey gives caregivers an option for sharing their voices even if they are not able to attend the on-site review — or aren't comfortable speaking in a group.

Data gathering: An essential step in preparing for the revised review process includes confirming specific indicators to measure how well the organization is integrating the mission and values into policies, practices, decisions and their application. A data-gathering tool collects information in the areas of mission and values integration, care for the poor and vulnerable, human resources and organizational health, continuous improvement and quality, spiritual care and ethics and population health.

Each site's patient experience survey results, caregiver engagement scores, community health needs assessments, quality metrics and financial policies also are put together, along with the self-reflection results. When it is time for the

PEACEHEALTH CATHOLIC IDENTITY STATEMENT

Founded by the Sisters of St. Joseph of Peace in 1890, PeaceHealth is a Catholic Healthcare Ministry serving in the communities of Alaska, Washington and Oregon. PeaceHealth continues the healing mission of Jesus Christ by:

- Valuing the human dignity and worth of each person from conception to natural death
- Attending to the whole person (mind, body, spirit & relationships)
- Improving the lives of all people with special concern for those who are poor & vulnerable
- Accompanying those who are suffering
- Healing the conditions that impede wholeness
- Working collectively for the common good
- Living out the Gospel Ministry of love and compassion

A charge to ensure two-way communication has led to deeper leadership rounding throughout the organization.

mission assessment on-site visit, review team members have packets full of those rich details that give them a picture of mission integration at each facility. Team members add to the information throughout the assessment process, and the results are included in each operating unit's follow-up reports and rolled into the system report.

Showcase stories: Drawing upon whatever they are most proud of as expressions of lived mission and values, caregivers in each PeaceHealth facility are invited to prepare up to 10 short "stories" through art, music, storytelling or testimonials. At each on-site review, the stories are presented in a 90-minute opening showcase — and they bring the mission and values to life. From community to community, we have found the stories amaze and animate showcase audiences with enthusiasm and pride of place and ministry.

Mission roundtables: These are dialogue sessions scheduled across several shifts to give caregivers maximum opportunities to participate. The first area for discussion is this: "How well are we giving expression to Catholic identity in terms of the very practical and tangible ways we carry on the healing mission of Jesus Christ and give witness to the heritage of our founding Sisters of St. Joseph of PeaceHealth?"

For the review team, the underlying purpose is to listen for what it means to the caregivers to be entrusted with carrying on the healing mission of Jesus. Table hosts from each facility, trained in advance on how to create a welcoming space, pose a starter question for dialogue and ask additional questions as time allows, encourage everyone to participate and note key ideas, doodle and draw on the paper-covered tables.

Then, table hosts follow up with this question: "What are the things we need to retain, deepen or change to fully actualize this commitment?"

In this way, caregivers are encouraged to discuss not only the positive examples of how the mission is being lived, but also where there are opportunities to improve. We have found that

caregivers share openly and respectfully when there is a climate of trust and listening and a genuine interest in dialogue. At the end of each visit, table hosts and review team members gather to debrief and capture key learnings and insights immediately, logging them into a report.

Information from each facility is blended and then integrated across facilities, offering community-specific summaries as well as a systemwide report reviewed and approved by the sponsors.

Follow-up: To deepen relationships at the local level, the review team talks with executive and middle management leaders about what has been learned within their operating units, engaging them in further dialogue and charging them to continue the listening sessions with their colleagues and caregivers around issues or concerns, visions and hopes identified during the review.

Overall results are mapped into the PeaceHealth system's operating plan and adopted by the board as formal recommendations for action by the organization's leadership team. The leaders are charged with implementing the follow-up within their teams.

For example, a charge to ensure two-way communication has led to deeper leadership rounding throughout the organization. Another example is integrating feedback from the review into the caregiver engagement plans. This has included responsibilities for deepening the opportunities for storytelling, recognition, renewal and support, particularly during times of change.

Each area identified in the assessment has led to further dialogue regarding how to integrate the recommendations into the policies, programs and processes that support the actualization of

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the mission and integration of the values in practical ways throughout the organization. Through the dynamic and interactive exercise of engaging key stakeholders in the process, the review itself offers insights as well as acknowledgement of the rich and meaningful expressions of the lived

experience of mission and values through dialogue and engagement. Follow-up by leadership is significant, and it is poised to have a positive impact on the overall culture within each of the PeaceHealth communities of ministry.

The mission and values review process offers a powerful opportunity for stakeholder input into the organization's strategic planning process. The board/sponsors have specific feedback on the strengths and opportunities identified by the review team that can be used as a focus and lens as facilities, departments and units enter into strategic planning. Each subsequent on-site review can revisit the overall summary of the systemwide results as they are mapped into the specific operational plan and assessed through formal metrics.

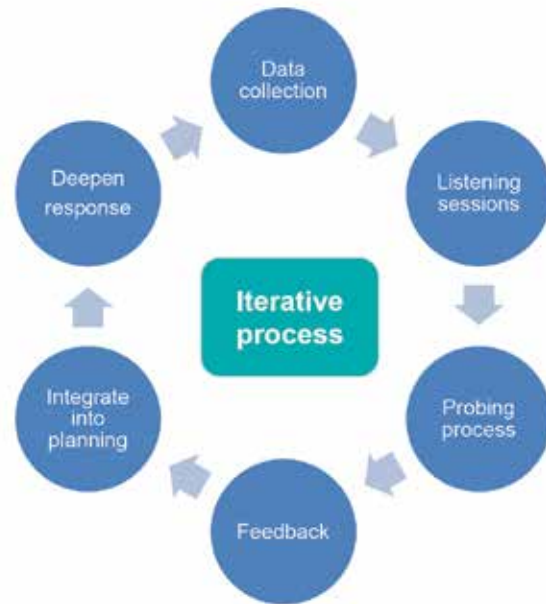
To integrate each learning, the organization needs to ensure leaders continue to hardwire the details with specific action plans and deliverables as the organization aligns its processes for the future. Thus, mission becomes integrated into the overall planning process, as it is empowered by the current state assessment, stakeholder engagement in identifying strengths as well as opportunities, deeper understanding through dialogue and feedback mechanisms, and summarized learnings.

In this way, the mission assessment process together with the mission integration strategies significantly affect the organization's overall culture, practices and delivery systems, furthering the mission in an iterative and interactive way.

Mission assessment requires understanding the practicality of effective assessment tools and mission integration practices, the value of stakeholder input and the inspiration required to catalyze collective change. This must happen by discerning the current state of the ministry, ascertaining the needs and effectively reading the signs of the times.

Across the board, Catholic health care leaders are faced with delivering increased value at a lower cost with higher quality without sacrificing patient satisfaction or caregiver engagement.

Snapshot of Review Process



Leaders are looking to foster engagement in ways that are congruent with our stated mission and values. They also are eager to adopt approaches that are integrative in nature. Engagement strategies that both deepen caregiver commitment to the mission and values of our Catholic health care ministry and invite caregivers to serve in ways that are congruent with that mission are the essence of what it means to carry on and live the mission every day.

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