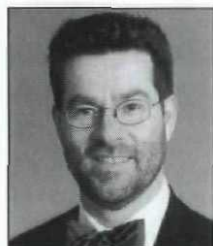


MELDING MISSION AND VALUES

Catholic Healthcare System Carries Out a Smooth Cultural Transition at a Formerly For-Profit Hospital

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"Integrating Cultures, Part I" a CHA resource that appeared last year in Health Progress (March-April 1999, pp. 65-78), outlined steps that mission leaders and others should consider when linking one healthcare organization to another through a merger, acquisition, joint operating agreement, or other arrangement. Since the resource was published, one of its authors has been involved in an acquisition process. In the following article, he and a colleague explain how that process unfolded, including the ways the sponsoring organization modified the "Integrating Cultures" model to fit the particular circumstances of the acquisition.

In February 1999 Alexian Brothers Health System (ABHS), Elk Grove Village, IL, acquired from Columbia/HCA Healthcare Corporation two adjoining hospitals in Hoffman Estates, IL. One was the 344-bed Hoffman Estates Medical Center, the most profitable Columbia/HCA acute care facility in the Chicago area; the other was Woodland Hospital, a 100-bed psychiatric facility.

Realizing that this change in ownership would bring cultural changes as well, ABHS's leaders had begun what they called a "mission transition" process in December 1998, nearly two months before the actual acquisition. They established an eight-member mission transition task force made up of representatives from ABHS, on one hand, and Hoffman Estates Medical Center, on the other. The authors of this article cochaired the initiative.

The task force focused on the acute care facility. Because ABHS planned to consolidate its behavioral health programs at Woodland Hospital—a process that would require major operational changes—it postponed mission transition there for the time being.

"The mission transition required plenty of

planning, multiple meetings, relentless attention to detail, ongoing monitoring, and—most important—relationship building," one task force member said later. "Before you build a relationship, no trust exists. And trust serves as the foundation of the mission transition process."

PLANNING THE PROCESS

"We met four or five times before the system finalized its agreement with Columbia," said another task force member. "We had to cover a number of basic questions, such as What is the Alexian Brothers's mission? and What does it mean to have a Catholic identity? That helped to establish a common understanding and nomenclature. And the task force members from Hoffman Estates Medical Center told us about the facility's culture, so we could understand its nuances."

Having arrived at a common understanding of the Alexian Brothers' mission, vision, and values, the task force drew up a 1999 mission orientation plan for the acute care hospital, including educational sessions for its executives, staff, and board members. This plan, combining the best elements of the hospital's old culture with those of ABHS, would transform the hospital into a Catholic healthcare organization. The task force based its plan on a three-phase model described in the "Integrating Cultures" article. "Because of the way our transaction unfolded, the mission transition process actually began during the article's second phase," said a task force member. "So we modified the structure described in the article to fit the unique circumstances surrounding this particular transaction and transition process."

SYMBOLISM MARKS THE CHANGEVER

ABHS completed acquisition of the two facilities February 1, 1999. The task force had voted to

forgo an initial organizational climate survey suggested by the CHA model. "With the whole transition from for-profit to not-for-profit, we decided that since people at the hospitals were facing so many other changes, the timing for a survey wasn't right," a task force member said.

Instead, the task force began mission transition with several symbol-laden steps.

Renaming the Hospitals

The two facilities were given new names during a special celebration and prayer service. Hoffman Estates Medical Center became St. Alexius Medical Center and Woodland Hospital became Alexian Brothers Behavioral Health Hospital, and both were welcomed into the Catholic healthcare ministry. (A separate ceremony celebrated the expansion of the Alexian Brothers's healthcare ministry in Illinois.)

Adopting the Directives Both hospitals adopted and immediately implemented the *Ethical and Religious Directives for Catholic Health Care Services*.

Appointing a Mission Services Director Rev. Mark Tabbut, a Presbyterian minister, was named director of mission services for both hospitals. At St. Alexius, a priest and a member of the Sisters of Mercy became staff chaplains; a Catholic deacon continues on in a volunteer pastoral care position. Each hospital's pastoral care department was renamed the department of mission services and pastoral care.

Writing Mission and Vision Statements St. Alexius's executive team, working with ABHS and the task force, wrote new mission and vision statements for the acute care facility. "These were intentionally built on the Hoffman Estates Medical Center's mission and vision statements," a task force member said.

Installing New Symbols and Signage At St. Alexius, members of the Alexian Brothers congregation placed religious symbols in patient rooms and offices. They also developed a plan for new signage at both hospitals.

THE ORIENTATION PROCESS

Later in February, ABHS leaders gave a presentation to St. Alexius's board concerning the Alexian Brothers's history; the hospital's mission, vision,

There were 35 Values in Action sessions for the hospital's staff members.

and values; and what it means to be a Catholic institution. Then, in March, the task force presented it to the hospital's department heads before initiating the process hospital-wide.

Following these "training the trainer" sessions, task force members paired off with department heads to deliver to each department an orientation session called "Values in Action."

These sessions—which

included a video on ABHS values, a slide show and companion booklet on the system's sponsoring congregation, and a discussion of the hospital's new mission and vision statements—typically lasted 60 to 75 minutes apiece. From them employees learned that their annual evaluations would be partly based on how well they put Alexian Brothers's values into action. There were 35 Values in Action sessions for the hospital's 1,100 staff members, each of the sessions attracting 25 to 35 employees. By late April, when the series was concluded, all St. Alexius employees had attended a session.

"The ABHS values presented in the sessions—compassion, dignity of the person, care of the poor, holism, and partnership—were already familiar to the hospital's staff," said a task force member. "It was a matter of discussing them and understanding how they apply in a Catholic-sponsored culture." Meanwhile, ABHS leaders delivered presentations on Catholic identity and sponsorship to St. Alexius's board and ethics committee; they gave one on social accountability and community service benefits to the hospital's leaders.

In June, Card. Francis George, archbishop of Chicago, dedicated and blessed both St. Alexius and Alexian Brothers Behavioral Health Hospital. ABHS leaders gave presentations to St. Alexius's department heads on the *Ethical and Religious Directives* (in October they delivered similar presentations to the hospital's board and ethics committee).

A SMOOTH TRANSITION

St. Alexius's employees responded positively to the Values in Action sessions. The transition process was further eased by the fact that all of the former Hoffman Estates Medical Center's leaders

and most of its staff continued in their positions under the new sponsors.

To ensure a continuing Alexian Brothers presence at the hospital, several members of the congregation were named to the hospital's board. One brother has joined the staff. He greets patients and helps make them feel welcome; with another brother, he also conducts monthly mission and values orientation sessions for new employees. The mission services director

has continued with the hospital's network of on-call chaplains, thereby making more pastoral care available. Liturgies, celebrated Monday through Friday in the hospital's chapel, can be viewed by bedridden patients over a closed-circuit television system.

COMPLEMENTARY PROGRAMS

During the summer of 1999, ABHS complemented its mission orientation sessions with a Workplace Ethics program, which enhanced St. Alexius's staff's understanding of government rules and regulations in relationship to Alexian Brothers values. The program, outlined in a video and a booklet, explains employees' responsibilities for compliance, including the responsibility to report any violations of compliance standards or related policies or procedures.

To further emphasize the importance of mission and values in St. Alexius's staff, the task force established the Alexian Spirit Committee, made up of 20 employees who meet monthly to organize charitable, community-service, and employee-support activities, including, for example, a Thanksgiving food drive for needy families. The hospital's public relations department, meanwhile, launched a program to increase St. Alexius's visibility as a Catholic institution.

More importantly, the task force launched a parish nurse program in which two registered nurses from St. Alexius provide free health services to members of two local Catholic parishes. Through this program, the hospital, long active in the community, has intensified its community-service initiatives.

ASSESSING TRANSITION EFFORTS

By September 1999, eight months after ABHS had acquired the two facilities, the task force was

The Alexian Spirit Committee organizes community-service activities.

ready to gauge the efficacy of the mission transition process at St. Alexius. It surveyed 200 staff members, asking them 15 questions about effectively communicating mission, values, and Catholic identity.

According to the survey, 58 percent of employees thought Alexian Brothers' sponsorship had "to a great extent" fostered a values-driven culture at the hospital in

the past year. The survey also revealed that:

- Eighty-two percent of the respondents thought they understood St. Alexius's mission "to a great extent."
- More than 90 percent believed religious symbolism had become visible "to a great extent" throughout the hospital.
- Seventy-seven percent agreed the hospital was committed "to a great extent" to improving community health.
- Sixty-three percent believed the hospital demonstrated "to a great extent" a holistic approach to healthcare.

A PROCESS THAT WORKS

In the spring of 2000, the task force was nearing the end of its efforts and preparing to transfer responsibility for continuing mission integration to St. Alexius's leaders. The hospital had plans for, along with annual mission assessment surveys, a periodic leadership retreat in which managers would talk about how they could demonstrate Alexian Brothers' values in their daily work. An initial leadership retreat produced three teams, each of which was charged to develop and implement values-driven initiatives that would enhance the culture in the areas of communication, environment, and hospitality.

"We have done a lot in a very short time," a task force member said. "This shows how much you can accomplish when good people commit themselves wholeheartedly to the collaboration process, customize the cultural integration model to address their organizational needs, and work together to see it through." □

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