

“Pathways of Leadership” Formation at Mercy

BY ED GIGANTI

In discussions about the leadership needs for Catholic health care in the future, more and more often sponsors and other leaders call for leadership “formation.” Appropriating the word that in earlier decades described the journey young women and men made in religious life, reorienting their lifestyles for ministry, many sponsors, in particular, are quick to make clear that formation for busy health care leaders must and will be a very different process than that experienced by young sisters and brothers. However, recognizing that the effective leaders of ministry organizations must know and enact the transforming, healing mission of Jesus that animates the church’s health ministry, many sponsors and health care systems are redefining formation and developing contemporary processes for it. (Recently, the members of CHA’s Ministry Leadership Development Committee collaborated on a descriptive articulation of leadership formation for ministry. I will report on their work in a special section focusing on leadership formation in the September-October 2004 issue of *Health Progress*.)

In the past decade, many organizations have invested significantly in leadership development programs that included competency identification, assessment, mentoring, and more. They have partnered with leading organizational development firms, customized proven programs, and created programs from the ground up. As systems now create and begin to implement *formation* programs, the question arises how these activities differ from and complement the leadership development processes that have been under way for years.

At Sisters of Mercy Health System, St. Louis, attention to leadership formation permeates all programs and processes of leadership development offered to the system’s executives and managers, a comprehensive palette of developmental offerings branded as Mercy Leadership Pathways. While some systems are offering leaders’ retreats for spiritual enrichment and opportunities for



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learning about Catholic identity, social justice, and more, a team from Mercy’s Mission and Ethics and Human Resources (HR) departments is ensuring that attention to personal spirituality, mission, and Mercy heritage and culture are seamlessly integrated into all Pathways programs for leaders, from senior executives to frontline supervisors. I recently spent an afternoon with this team to learn more about its approach. I spoke with Brian O’Toole, PhD, vice president; Lynette Ballard, director of mission training and development; and Steve Isenhower, vice president, and Kelly Pingleton, director of leader effectiveness, both from the system’s HR department.

NEW LEADER ORIENTATION

There are three large pieces to Mercy Leadership Pathways: New Leader Orientation, the Pathways Curriculum, and Mercy Leadership Institutes. New Leader Orientation takes place quarterly at Mercy Center, a retreat facility on the grounds of the motherhouse of the system’s sponsoring congregation. The program is intended for anyone new in a leadership role in one of Mercy’s regional organizations, which are called “strategic service units” (SSUs). Participants are chosen to attend by the leaders of their SSUs. The SSU pays travel expenses to the program in St. Louis, and the system office pays the cost of lodging and meals.

“This program gives new leaders an opportunity for a retreat, time to slow down, to reflect, and share with one another about how they are called to their leadership roles,” Pingleton told me. During the orientation, participants have a chance to meet the system’s leaders, including President/CEO Ron Ashworth, and learn about the heritage of the Sisters of Mercy. They also learn about Catholic identity and the church’s justice teaching and how these apply to health care and to work life. O’Toole teaches sessions on the *Ethical and Religious Directives for Catholic Health Care Services* and the system’s ethical decision-making process. Sr. Mary Roch Rocklage, RSM, chair of the system’s board,

explains what it means to be sponsored by the Sisters of Mercy, including what the sponsoring congregation expects of leaders and managers.

"Right from the start, the atmosphere is very important," Ballard said. "They arrive at noon, have lunch together, slow down a bit, and then come together for prayer. When they meet with Ron [Ashworth], it's an opportunity for them to tell him what they bring to the system. His message to them is that 'We're interested in you, in who you are.'"

Pingleton said that participants come to the program having read some advance materials: selections from the constitution of the Sisters of Mercy, a short biography of Mercy foundress Catherine McAuley, an article on the system's strategic initiatives, and similar items. During the orientation, system vice presidents who "champion" these strategic initiatives meet with the group and brief them.

Ballard said that throughout the orientation, the theme of "call" is threaded through prayers, reflections, and discussions. "After the meeting with Ron, we begin the conversation about call with a story from Scripture, the story of the call of Samuel. The participants resonate with the notion of call, both what calls you here and what keeps you here. This reflection allows them to articulate what they may have felt intuitively." Some participants, she added, take this opportunity to talk about what led them into health care, what it means to be of service to others who are in need, and to contrast their experience with the for-profit motive that is dominant in society. "They sometimes say, 'Something beyond my choice brought me here.'"

New Leader Orientation also includes a day-long introduction to Mercy's 12 leadership competencies. This, too, is an opportunity for mission education. "Brian has done an outstanding job of articulating how each competency is grounded in the ministry of Jesus and Catherine McAuley," Pingleton said. She gave an example of how the competencies are taught. "One of our leadership competencies is 'Models compassion for others.' We created what we call the 'gown exercise' to teach about this competency. Participants get into small groups, and one person puts on a hospital gown and plays the patient, another plays a family member, another plays the professional caregiver, and they role play. Then we talk about what compassion looks like, feels like. There's always a mix of humor and very rich personal discussion," she said.

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PATHWAYS CURRICULUM

Supporting the development of the Mercy competencies is a plan for an entire curriculum of courses, most of them four-hour modules that will be delivered at the SSU level. "If Pathways is going to be our platform for leadership development," Isenhower said, "we have to have a full catalog." Since kicking off the Pathways program two years ago, 12 courses have been developed and rolled out to the facilities. Also, an extensive network of Mercy faculty has been mobilized for the delivery of this curriculum.

Senior leaders at Mercy are required to participate in at least two days of "key" Pathways curriculum training, Ballard said. This key training, addressing critical themes such as "leading change" and "service leadership," is developed first for the system's annual senior leader events, held each fall for SSU CEOs and vice presidents and system executive leaders. Following these events, the key training is deployed throughout the system for leaders at other levels.

These key training events offer an opportunity for spiritual growth, introspection, and prayer. But sometimes, O'Toole said, it is not easy to move senior leaders to reflection. "One of the greatest challenges is that people are busy and active. It's not that they don't want to be introspective and reflective; we just have to find different methodologies that match their pace and their own spiritualities."

At a recent training session, O'Toole involved the leaders present in what he calls "the Barcalounger experience." After gathering the group in a room furnished with comfortable recliner chairs arranged in a circle, O'Toole asked them to read and comment on a case study about a hospital CEO inundated with pressures involving financial performance, physician relations, and sponsor expectations, among others. O'Toole opened the dialogue by asking participants what the CEO in the case should do.

At first they started talking about the case, problem solving for this fictional CEO [O'Toole said]. But quickly they moved to talking about their own experiences. As soon as one or two began to reflect personally, then the whole group moved in that direction. We were able to push the dialogue with questions like, What makes it difficult to delegate? What is hard about working as a team? What got you into this work? What is frustrating you now? Through the case study, they had a work-

related way of reflecting on their own personal experience. The key was having something work-related.

All Pathways courses have been and will continue to be developed internally by system staff in Mission and Human Resources. Pingleton and Ballard share responsibility for the curriculum development. Pingleton has a staff that includes a full-time instructional designer and two HR coordinators who handle production and distribution of course materials. Development and piloting of each course takes five or more months. Courseware typically includes participant and facilitator guides, PowerPoint presentations with scripts, and, in some cases, books and videos, some of which have been produced by Mercy. These toolkits are provided at no additional cost to the SSUs, so, Isenhower said, "there is an incentive to use them."

"The skill part of what we are teaching is probably the same as for any health care organization," Isenhower said. "The Mercy piece is not *what* we do but *how* we do it, how we do performance management or confrontation about non-compliance."

O'Toole said, "I use the metaphor that we put on our 'Mercy glasses.' We ask: What does conflict management look like through the Mercy lens? We learn from highly regarded long-term Mercy co-workers, and we get input from the mission leaders, the local educators, and the sisters as we shape the content." Ballard gave as an example of the system's course on worker satisfaction. "Of course we teach that in a workplace where people are engaged, there will be fewer injuries and absences and lower turnover. But we define the just workplace as one in which people are in 'right relationships' with one another. Our leaders come to understand that workplace justice goes beyond satisfaction metrics. It's who we are together as a community."

Another course addresses how to "hire for fit" with the Mercy culture. "It took over a year to do research, interviewing the sisters and using other resources, to customize standard behavioral event interviewing questions and develop screens to evaluate candidate responses for Mercy fit," O'Toole said.

The third major part of the Pathways program is the quarterly Mercy Leadership Institutes, which are planned and conducted at facilities for local leadership. While serving strategic goals, these institutes also examine the Mercy heritage and tradition, and such dimensions of ministry

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leadership as relationship building and workplace justice.

NOT AN EASY TASK

The challenge in integrating these mission messages into the courses, O'Toole said, is "how you weave it in without diluting the importance of the skills we are training for. We don't want to soft-pedal the mission message, but we also don't want to overdo it."

"Brian has been particularly emphatic about dispelling the notion that being in ministry doesn't mean not being accountable, that you can't apply the 'hard skills' in a faith-based ministry because it would not be compassionate," Isenhower said. "They might seem to be mutually exclusive, but we try to put them together in what one of our sisters calls 'compassionate assertiveness.' The hard skills are important, but practiced with respect for the individual and the other dimensions of our Mercy lens."

In the past, Mercy conducted leadership for ministry programs that were parallel to but separate from leadership development programming. "The challenge for leaders was to bridge these two programs," O'Toole said. Isenhower said that the roll-out of a systemwide "Mercy Service" initiative in 2001 allowed the system to integrate these two approaches.

"The hard part is that we are creating everything for leadership development," O'Toole said. "It takes a lot of time and effort, really trying to figure out how to blend these two pieces together. It's a collaborative, interactive process that involves not only our two departments, but even Ron Ashworth." Pingleton noted that Ashworth has devoted countless hours to reviewing courseware and brainstorming with staff about future courses. "We try hard to be clear and faithful to the mission in a way that is meaningful to our leaders," O'Toole added.

Isenhower said the Pathways program is "wildly successful" and that the system receives many requests from SSUs for course kits, training, and consulting. Total audience for the Pathways program is 1,900 leaders throughout Mercy. The system plans to spend \$3.5 million over five years to support Pathways, a figure that does not include the cost of staff time for development or participation. □

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