

# A HOLISTIC APPROACH TO THE BUSINESS OF CATHOLIC HEALTH

Recently, I traveled to Mercy Health Saint Mary's in Grand Rapids, Michigan, for meetings and to facilitate a retreat for its spiritual care department. During that visit, I met with my friend and mentor Sr. Myra Bergmann, RSM, who is regional vice president, mission integration, for Trinity Health's West Michigan Region. We got together to prepare a module called "The Business of Health Care and the Mission Leader" that we co-present to new mission leaders during CHA's "Prophetic Voice" program.



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We decided to incorporate a values-based decision-making process in our presentation with a case study that would help the participants work through these stages:

- Gather information
  - Carefully identify the issue
  - Review core commitments
  - Identify alternatives
  - Pray and reflect
- Make a decision
  - Implement the decision
  - Evaluate the decision

Most of CHA's members use similar values- or ethics-based decision-making in their facilities and systems. The process is a tool that engages multiple perspectives and draws on human intellect, imagination, memory, spirituality and faith. The result is a deliberate discernment to ensure that mission, vision, values and identity are applied to the issue being considered. However, in speaking to mission leaders throughout the ministry, we know too well that sometimes the process is rushed, skipped, or, worse yet, completed by a few like-minded senior leaders who simply want to check a box. A common story among mission leaders is being asked to "do" a values-based decision-making process after the fact — we call this baptizing a decision already made.

During our meeting, Sr. Bergmann and I lamented over problems created when an organization does not use a values-based decision-making process. Among the examples: partners who didn't know what it entails to adhere to the *Ethical*

*and Religious Directives for Catholic Health Care Services*. A bishop who needed to be included in a decision, but nobody told him about it. An organization's decision that gave no thought to creating a communication plan for informing associates who were going to be adversely affected.

Sr. Bergmann joked, "One day, in my spare time, I am going to write an article on how we need to be serious about using this holistic view to organizational decision-making. We talk about providing care for the whole person: body, mind, spirit and relationships. Do we ever think about why caring for the body, mind, soul and relationships of the *organization* is so important?"

I was so moved by her insight that I suggested we reframe our presentation to demonstrate that doing the business of health care, in the context of ministry, requires a holistic approach. A holistic approach to organizational decision-making goes far beyond how a decision will impact productivity, market share and margin. A true discernment involves body, mind, soul and relationships. Business and mission are not two separate entities — business decisions are a critical area where mission integration needs to take place.

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Mission due diligence is another example of a tool senior leaders use to ensure their organization is making decisions in a holistic manner. Catholic health systems are adding a mission and ethical component during the due diligence phase when exploring potential relationships and partnerships, be they accountable care organizations, wholly-owned, other-than-Catholic entities, joint operating agreements, affiliations, contracts or physician networks.

Some examples of the holistic conversations that should take place in the due diligence phase include:

- What is the motivation for this particular decision, action or partnership?
- What is the impact of the proposed decision on our Catholic identity, reputation and image in the community?
- What is the impact of the proposed decision on all of our stakeholders, including patients/residents, associates, providers, vendors, bishop and the community, especially the poor and vulnerable?
- Are there any moral or ethical issues that are raised by the proposed decision? Any beginning- or end-of-life issues?
- As we implement this change into our organization, what impact, if any, will there be on staff morale, patient care and quality?

A holistic approach to our business decisions offers an intentional methodology consistent with our theology and the way Jesus approached life — caring for the total person, body, mind, spirit, and relationships. Our faith, the Gospel stories, and our Catholic tradition lead us to consider principles such as human dignity, the common good, care of the poor, human flourishing, solidarity, subsidiarity and responsible stewardship of human and environmental resources. These principles help us look at our business decisions from the standpoint of what it means to be fully human, engaged in relationships that are moving us towards a more just and charitable society. This holistic view of the human person and of society is distinctly Catholic and needs to be incorporated into our organizational decision-making processes.

Recently, while reading from the Second Vatican Council's document, *The Church in the Modern World (Gaudium et Spes)*, I came across a passage that summarized this holistic view of the

## **A holistic approach to our business decisions offers an intentional methodology consistent with our theology and the way Jesus approached life — caring for the total person, body, mind, spirit, and relationships.**

human person and why it is important to keep it in mind as we approach complex problems. The council fathers lay out a framework for a holistic approach to humanity and how we as individuals, organizations and the human family can approach the problems and challenges of our world:

Though humankind is stricken with wonder at its own discoveries and its power, it often raises anxious questions about the current trend of the world, about the place and role of man in the universe, about the meaning of its individual and collective strivings, and about the ultimate destiny of reality and of humanity. Hence, giving witness and voice to the faith of the whole people of God gathered together by Christ, this council can provide no more eloquent proof of its solidarity with, as well as its respect and love for the entire human family with which it is bound up, than by engaging with it in conversation about these various problems. The council brings to humankind light kindled from the Gospel, and puts at its disposal those saving resources which the Church herself, under the guidance of the Holy Spirit, receives from her Founder. For the human person deserves to be preserved; human society deserves to be renewed. Hence the focal point of our total presentation will be man himself, whole and entire, body and soul, heart and conscience, mind and will.<sup>1</sup>

Applying this 50-year-old document to the current realities in health care, one immediately sees the prophetic nature of *The Church in the Modern World*. On the one hand, we are in awe and won-

derment over the advances of medicine and technology; while on the other hand, we are anxious about their ethical implications and what these discoveries mean in terms of our humanity and our ultimate destiny. We are beginning to realize our medical advancements not only impact our body but have implications for our mind, will, soul and relationships. The council fathers' desire for the church to be engaged in conversation with the world and to share the light of the Gospel and the grace of our founder is an invitation for the church to be in the world — not afraid of it — and also to remain holy (i.e. separate and distinct) and not become “of” the world.

This has direct implications for Catholic health care. It is a mandate for all of us to bring Gospel values, Catholic theology, ethics and social tradition into dialogue with the issues of business and technology within our organizations on a daily basis. It also is an invitation to be in conversation with potential partners who are other-than-Catholic so we can advance the common good in a manner that is true to our identity and provides testimony to the power of God's love being manifested in the world. We do not need to be anxious about engaging with other organizations as potential partners. Pope Benedict XVI predicted there will always be “tensions involved” in these relationships; however, commitment to charity entails collaboration with other entities, charitable agencies, churches and state agencies because we all have the same fundamental motivation and goal: building a better world.<sup>2</sup>

If we are truly continuing the healing ministry of Jesus, our holistic approach to care needs

to go beyond how we provide body, mind, spirit and relational care for our patients and residents. It needs to be fused into the fabric of the organization: how we relate to one another, the way we conduct business, with whom and how we enter into partnerships and how we discern and make decisions in our organizations.

Sr. Bergmann planted a seed that day as we conversed in Grand Rapids. Her vision of Catholic health care being serious about incorporating a holistic approach to organizational culture caught my imagination. I already am incorporating her insight into my mission integration and formation work.

This column has outlined what a holistic approach might look like in some of the business aspects our health care ministry. But I believe the insight, because it is based in the Living Word, will continue to grow and bear more fruit for the ministry if we take the message to heart and use it throughout our organizations. My humble attempt to capture its truth is in no way a replacement for the more comprehensive article I hope my dear friend and mentor will one day write and share with us.

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#### NOTES

1. Second Vatican Council, *Pastoral Constitution on the Church in the Modern World*, Preface, no. 3.
2. Benedict XVI, *Deus Caritas Est*, section 30.

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