

ADVANCING CHA'S NEW STRATEGIC PLAN

The first CEO I worked with, when I started as a mission leader in Catholic health care, told the leadership team at every opportunity, “Everything we do must be tied to our mission and strategic plan. If it’s not, then we probably shouldn’t be doing it.”



BRIAN SMITH

That sage advice has become my “true north.” Today, when I consider whether I should start a new program or create a new resource, I ask myself, “What does this have to do with the Catholic Health Association’s ‘Shared Statement of Identity for the Catholic Health Ministry?’ or ‘How does this advance CHA’s strategic plan?’” Sometimes the answers have stopped me from pursuing something that would take time and energy away from other, essential work.

In September 2017, CHA’s Board of Trustees approved its FY2018-2020 strategic plan, developed with input from several CHA advisory committees, dialogue with key stakeholder groups, CHA staff and a survey of CHA’s members.¹ Task forces, ad hoc committees and several newly created think tanks, in collaboration with CHA staff, are developing implementation strategies for the strategic plan’s goals and objectives.

One area of particular focus is strengthening the Catholic identity of member associations. To that end, CHA is working to facilitate stronger relationships with dioceses, the United States Conference of Catholic Bishops and the Holy See; expand ministry formation opportunities for members; help increase understanding and appreciation of sponsorship as essential to Catholic health care as a ministry of the church; and increase CHA’s influence as a leader and trusted resource in ethics, mission and sponsorship.

INITIATIVES

Several system ethicists, chief executives and other ministry leaders, including Sr. Carol Keehan, DC, CHA’s president and CEO, and Fr. Thomas Nairn, OFM, PhD, CHA’s former senior

director for ethics and theology, have been meeting with USCCB representatives regarding a revision to Part Six of the *Ethical and Religious Directives for Catholic Health Care Services*, “Forming New Partnerships with Health Care Organizations and Providers.” The experience of ethicists and CEOs who have been directly involved in creating agreements with other-than-Catholic organizations has been invaluable.

A task force of theologians, ethicists and mission leaders has collaborated on three resource guides regarding end-of-life issues, advance care planning, palliative care and hospice. Though the guides reflect the Catholic perspective, they are useful for any faith tradition. Written for use by Catholic health facilities, dioceses and parishes and available in English and Spanish, the guides have become CHA’s top-selling resources. They are part of a greater effort to educate clinicians and clergy and offer Catholic resources to Catholics and others as the debate over medically assisted suicide expands in the United States.

In 2018, CHA will be piloting a workshop for priests, deacons and seminarians about issues at the end of life. The goal is to offer education about advance care planning as well as to suggest ways for preachers to incorporate those ethical teachings into their pastoral counseling and Sunday homilies. Fr. Charles Bouchard, OP, STD, CHA’s senior director for ethics, and Nate Hibner, CHA’s director, ethics, will lead the initiative.

EXPANDED MINISTRY FORMATION

During the strategic planning process, the CHA board kept returning to the need for expanded ministry formation at all levels in order for Catholic health care to continue to flourish and remain true to its ministerial identity. One of the new think-tank initiatives focuses on CHA members’ formation needs, starting with the introductory

formation training that new leaders in Catholic health care receive.

Prior to a November 2017 think-tank meeting, CHA sent an electronic survey to all system mission and formation leaders asking them about the content covered in their introductory formation programs for new leaders; who attends the programs; who delivers the program; and how long the introductory formation period lasts. The results showed the formation programs were similar in content, but varied greatly in terms of who attended, who delivered the programs and how long they lasted. For example, the length of the introductory formation program for new leaders ranged from one hour to a year-long process of more than 20 hours spread over multiple sessions.

The survey also revealed that the average number of dedicated formation leaders per system is one. Although many systems report that they supplement their facility and regional mission leaders with outside resources from Catholic universities and colleges and from CHA, the wide variation in the amount of formation time spent with new leaders is creating a disparate understanding of the foundational elements of Catholic health care leadership.

The formation think tank has determined that in addition to in-person resources, it is time for CHA to offer online resources developed and presented by competent content leaders, to allow all members access to a robust and foundational formation program. A task force is now developing the next steps.

The formation think tank also has discussed the need for ongoing mission leader formation to develop competencies in ethics; business and financial acumen; mission and strategic planning; the ability to lead formation at all levels; and leadership skills in general. To that end, a task force of system mission and formation leaders and representatives from Catholic higher education will begin meeting in 2018 to explore resources and methods for delivering graduate-level courses and formative experiences to mission leaders striving to grow in one or more of the competencies.

Another strategic initiative is the development of a competency model for formation leaders. The model incorporates the competencies for mission leaders and adds facilitation and presentation.

Facilitation occurs when a formation leader can invite others into a formation journey that draws together a person's inner life and the exterior life of their behavior and action in a way that consistently maximizes discovery, understanding and outcome. In other words, facilitation helps make the connection between personal transformation and living the organization's desired culture, resulting in organizational transformation. Skills expected for effective facilitation include asking evocative questions and making connec-

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tions, being a catalyst for the dynamic interaction of reflection and action, and understanding adult learning theory and the dynamics of group process. These are skills that can be taught and developed in formation leaders.

Presentation is when a formation leader composes and delivers a clear, dynamic, content-specific presentation that informs, inspires and persuades an audience. Some of the ordinary skills of an effective presenter would include content expertise, the ability to enable participants to apply the learning in specific, practical ways, the ability to comfortably present to broad and diverse populations and the ability to maintain and manage group processes.

The task force that is developing mission leader competency resources will include the ability to lead formation along with the new facilitation and presentation competencies.

ASSESSMENT

Assessing formation effectiveness is a need members have expressed to CHA for several years, and

assessment has become a specific strategic initiative in the new plan. For example, how do we know formation is having an impact on leaders at a personal and organizational level? and How do we measure the impact with objective metrics tied to markers we look for in a healthy, vibrant culture?

CHA's Ministry Leadership Formation Advisory Committee has engaged a thought partner from the field of measurement and organizational culture to help move the project from the theoretical to practical reality. In 2018, the Metrics Subcommittee of the Ministry Leadership Formation Advisory Committee will work with the vendor to identify a process, specific questions, key performance indicators and the cost for member organizations to use such a measurement tool. CHA will share the information to determine if members would be interested in using and paying for this type of formation assessment tool.

Directly related to the impact of senior leadership formation is assessing ministerial identity, another new strategic initiative. This year, an ad hoc committee worked on developing a framework for an assessment tool² and will share the findings in January 2018 at "Critical Conversations," a gathering of system sponsors, CEOs and system mission leaders.

The initiative's next steps will be for a couple of member systems to pilot the assessment tool early in 2018, share it at the 2018 Catholic Health Assembly and make the tool available for all members during the summer. We believe the tool will be useful to sponsors who are accountable for the Catholic identity of the ministry, as well as to system CEOs and mission leaders when they meet with their local bishop or bishops.

SPONSORSHIP

Over the last few years, CHA has developed resources to educate leaders within the ministry and ecclesial leaders on the role of sponsor boards. *Go and Do Likewise* is an educational video developed in 2015 to highlight the role and importance of sponsors in the Catholic health ministry, to support sponsor formation, board education, leadership development and training initiatives. In 2015, CHA became the sole provider of sponsor formation for the association

as it launched its first cohort. This was followed in 2017 by the release of "Core Competencies of Sponsor" to guide and inspire members of public juridic persons in their canonical responsibility for the health ministry of the Catholic Church. CHA engaged members and leaders of sponsored ministries to help develop these core competencies to ensure the growth and vitality of the church's health ministry.

The collaborative work among members on these sponsor resources has helped to educate and form sponsors within Catholic health care, but the role of sponsor is still not totally understood by all systems' governance, nor by all bishops. The next phase of education is included within the 2018-2020 strategic plan.

CHA AS A LEADER AND TRUSTED RESOURCE

One new initiative further demonstrates how CHA is a leader and trusted resource for convening members and addressing their common needs

CHA has convened a committee of younger mission leaders and ethicists to help strategize on means of communicating the message that there are careers in Catholic health care mission and ethics, with positions waiting to be filled.

and challenges. For years, members have reported difficulty in recruiting talented and qualified mission leaders, ethicists and chaplains. Surveys of these three groups show most of the people who currently hold those positions plan on retiring in the next three to five years. These critically important specialists in Catholic health care help our organizations maintain ministerial identity. Succession planning and talent development for these hard-to-recruit positions are part of CHA's next three-year plan.

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and colleges about how we can deliver the message that Catholic health care is a viable option for students pursuing theology and ethics degrees.

In addition to developing better marketing and communication strategies, CHA will be working with members to envision and create mission and ethics internships and fellowships, as well as entry-level positions, so that individuals can gain experience for these essential roles. Other industries use this method as part of their succession planning strategy for difficult-to-recruit key roles within their organizations. It is time for Catholic health care to do the same.

Focusing on some of the new strategic initiatives surrounding CHA's FY2018-2020 Strategic Plan demonstrates how CHA helps its members identify common challenges and then work together as an association to create fresh

resources, processes and solutions. If we stay focused on our mission and our strategic plan, we can be confident the ministry will continue to flourish and grow.

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NOTES

1. Catholic Health Association of the United States, "FY2018-2020 Strategic Plan." www.chausa.org/docs/default-source/default-document-library/strategic-roadmap-2018-2020.pdf?sfvrsn=0.
2. Brian Smith and Thomas Nairn, "Developing a Catholic Ministry Assessment," *Health Progress* 97, no. 6 (November-December 2016): 77-79.

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