

Put Values Up Front

NEW DISCERNMENT TOOL MAKES SURE VALUES AREN'T LEFT TO CHANGE

BY GORDON SELF, M.Div., D.Min.

A senior executive sends a memo to all staff, physicians and volunteers announcing that, for financial reasons, a program will be closed. It details the sequence of events leading to the decision, describes the anticipated impact on programs and staff and offers mitigating strategies. The memo concludes by thanking people for their understanding and for their continued support for the *mission and values of the organization*.

This fictitious but plausible memo mentions mission and values and indicates they are important. Nowhere, however, does the memo articulate how such important concepts factored into the decision making process or provided a rationale for closing the program. As is all too often the case, mission and values remain peripheral, not central to our communication strategies.

Imagine if the memo had said this:

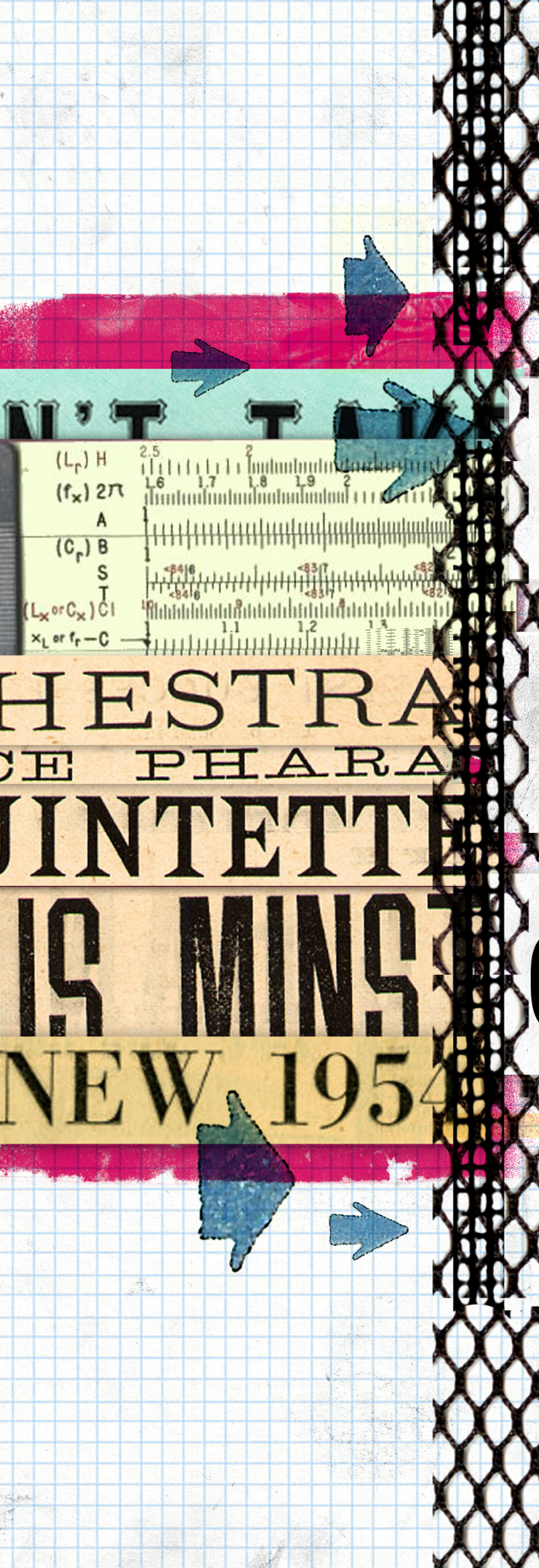
As you know, we must reduce our expenditures by three percent, which equates to \$15 million dollars. In order to meet this target, it is imperative that we also consider how we achieve this end, informed by our mission and values.

As a Catholic health care organization, our deficit reduction strategies must preserve and protect the dignity of all who may be potentially affected, including our patients and staff. We also must demonstrate a clear link to our values with each

option considered, and we must be able to articulate why one value is more important than another. This will require first that we understand what our values mean, and what they compel us to do.

This may appear an impossible task — living the mission while living within a dramatically reduced budget. It certainly would be more expedient to put aside our mission and values when difficult financial decisions must be made. But I believe the solutions that will help us remain a financially viable and responsible ministry in service to the community *are* those that witness our values. Ultimately, it will be the well-grounded, values-based decisions that we will be able to communicate with confidence, live with and morally defend.

This type of messaging requires time, thought and care, and demonstrates our belief as Catholic health care providers that how we arrive at deci-



VALUES

VISION

CLARITY

sions, and the way we communicate them, is just as important as the decisions themselves. To this end, Covenant Health has developed the *Covenant Health Mission Discernment Tool*¹ to help our leaders build and use this communication skill. While discernment tools are certainly not new to Catholic health care, we created ours to reinforce the communication dimension of values-based decision making — something we thought needed more

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emphasis in the ministry. We built in a series of questions that not only prompts leaders to articulate and weigh the values underlying a decision, but also helps them communicate with key stakeholders in ways that link the decision — and the decision-making process — to the underlying values.

CONSOLIDATION CREATES NEW SYSTEM

Our work began in October 2008 with the consolidation of 16 Catholic health care facilities in Alberta to create Covenant Health, the largest Catholic faith-based organization in Canada. Along with the consolidation came a new mission, vision, core values and logo building on the common legacy and strengths of our founding sites. Moreover, we structured a code of conduct around the newly articulated values, entitled *Our Commitment to Ethical Integrity*.

These foundational documents² form part of our broader mission integration and internal communication strategies. These early efforts conveyed to our organization the board and senior team's expectations that our values would drive everything we say and do, including the decisions we make.

However, despite this attempt to signal the importance of our values right from the beginning of the merger, we found our internal communications were not always explicit in naming the operative values underlying decision making. We may have been clear in providing the facts around a decision, and the implications for our organization, but often we failed to connect the rationale for the decision to a values perspective.

For example, in developing key messages for a memo announcing the closing of a long-standing and popular clinical program, we once might have made cursory reference to our values — and staff reading the memo could rightly ask, “Which values?” They might assume the decision was financial, a matter of stewardship.

But what if other values, such as compassion or trust, drove the decision? It would make for a very different message if leaders explained we were closing an under-utilized program that failed to meet quality standards and posed a continued risk of harming vulnerable populations.

Of course, not every decision is a public matter. Confidentiality and discretion are still hallmarks of a respectful culture. Nor should the Covenant Health values of *compassion, collaboration, stewardship, social justice, respect* and *integrity* limit us in what we can say about values in our general communications, as if these are the *only* values worth mentioning. For example, other Catholic health care organizations give equal prominence to spirituality, trust, subsidiarity, excellence, reverence, creativity, service to the poor, and so forth, which may be entirely appropriate for us to emphasize, given our roots in the larger Catholic faith tradition.

LINKS, NOT LISTS

Although not every policy must make explicit reference to our mission, values or ethical framework, for some it is a lost opportunity not to do so. We found that communications often were not linked to any values at all, leaving internal and external audiences questioning the rationale for a decision, or worse, assuming the “values” driving the agenda were things like expediency or reputation management. But, as in the example about closing the clinic program, just listing the values is not enough. Without saying how we weighed options against our values in discerning whether to maintain or close the clinic program, reference to values in the memo may sound hollow and disingenuous.

Linking values to decision making is even more important when the decision might be unpopular. For example, the merger of Catholic health care facilities in Alberta coincided with the downturn in the global economy, the H1N1 flu pandemic and a \$15 million dollar deficit in our operating budget, among other operational and political challenges. While the celebratory rollout of the Covenant Health mission and values statement created a brand identity for our new organization, these subsequent operational challenges tested their relevancy.

What's more, we faced significant cultural issues. There is a phenomenon here called the “Battle of Alberta” describing the historic rivalry between hockey and football teams in Calgary and Edmonton. At Covenant Health, we find it is a rivalry that subtly plays out in the publicly funded health care system in Alberta, too, reflecting the

geographic, cultural and program differences across our 11 communities. Decision making in this context has to be extremely sensitive, as Covenant Health learned in the rush to distribute vaccine for the H1N1 flu. For example, we have to be sure we don't approach issues with too narrow an acute-care focus, or in a way that seems to overlook rural experiences and needs.³

We developed the *Covenant Health Mission Discernment Tool* less than a year after consolidation and based it on confidential feedback from

structured interviews with board, executives and leaders throughout the organization. We wanted to develop a culturally specific tool that would meet our leaders' needs and draw upon their decision making experience. We also believed that as leaders learned to make major decisions reflecting consistent and explicit choices around our values, the process would transfer to more routine decisions. In this way, the reflection questions addressing our six core Covenant Health values would deepen our capacity as a discerning leader-

WHAT THE LEADERS TOLD US

The *Covenant Health Mission Discernment Tool* is based on hours of confidential structured interviews with members of the board and leaders from throughout the organization. We wanted to develop a culturally specific tool that would draw upon our leaders' decision making experience.

Of the many themes that emerged through the interviews, these were especially significant regarding how to integrate values into communication strategies:

Devote energy to communication and follow-up

Participants spoke about the energy needed to make difficult decisions. They also spoke of their failure to bring the same kind of energy to adequately communicating their rationale and for following up on the issue later.

It is helpful to have a process to guide leaders not only in making the decision, but also in how to communicate it. This can make the critical difference in how well a decision is supported, for people are more likely to accept a decision — even if it is unpopular or difficult — if they are given information about why, and how, the decision was made.

Leaders frequently under-communicate (downplay) their message after having spent inordinate time and energy arriving at it. Or they over-communicate (choreograph) the message in a way that may disguise lingering discomfort with the decision itself or how it was concluded.

Determining the appropriate communication strategy for a decision can be a discernment in itself in trying to determine the appropriate media, the target audiences, key message[s], tone, whether repetitive or staged communication is required, who the best spokesperson could be.

Don't stint on time

In the demanding health care environment, leaders must act quickly and decisively to ensure around-the-clock safe, competent and quality care 365 days a year. At times, administrative, clinical and ethical decision making can seem driven by the most expedient

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choice among competing options. It's important to carve out sufficient time both to make a good and thoughtful decision and to devise the strategy for clearly communicating it — and its rationale — to all stakeholders. The communication strategy should be part of the process right from the beginning, not an incidental step added at the end.

Be explicit in naming the values underlying the decision

Several participants acknowledged having made oblique reference to mission and values as a driver for a decision, while not actually articulating what those values were, or how they informed a particular decision.

Our discernment tool helps specify what operative values underlie leaders' discerned choices, as well as when competing values might need to be balanced. The tool also helps leaders know which core values may hold more weight, or trump, in certain instances. Ultimately, values compel action.

Maintain balance

It is understandable that one department, by virtue of its day-to-day work, may naturally gravitate to one value over another (i.e., stewardship in finance; compassion in palliative care). Good discernment, however, requires a balance of perspectives and attention to all values in the decision-making process. Also, choices need to be consistent and equitable so that like situations are treated in like manner. This is particularly important when, due to political pressure, the temptation might arise to give disproportionate weight to irrelevant factors or undue influences in the decision-making process that would not normally apply in another situation.

ship culture. The reflection questions would help integrate our values with the discernment framework so that, over time, the *values themselves become the defining means for good discernment*.

TRIAL BY FIRE: DEFICIT REDUCTION

During the summer of 2009, dialogue with our provincial health care funder, Alberta Health Services, made it clear that the economic downturn was going to require cutbacks.⁴ In September, we learned our operating budget faced a three percent reduction; that is, a \$15 million net loss in funding.

The *Covenant Health Mission Discernment Tool* had barely been completed. It certainly hadn't been launched. But the financial crisis and accompanying communication challenge made it clear we couldn't wait for a ceremonial unveiling.

On September 23, 2009, we sent a memo to our leaders requiring their attendance at a meeting to review our deficit reduction targets and requirements. We included background information, a financial worksheet and an electronic copy of the *Covenant Health Mission Discernment Tool*, with a brief description of its purpose.

Covenant Health's chief executive officer and president, the chief financial officer and the vice presidents of communications, mission, ethics and spirituality spoke at the meeting. Each discussed the challenges facing our organization and ways to address them, including using financial, mission discernment and communication templates. The task at hand: to reduce our operating budget by \$15 million and then to live within our new budget constraints.

Meeting the goals mattered, the senior leadership team said, but so did *how* we met the targets, as well as the principles by which we would abide. They were:

- Identify what makes sense based on our values and strategic directions
- Ensure patient and resident safety is not compromised
- Look for efficiencies with the least impact to staff
- Seek solutions with the least impact to patients and residents
- Seek opportunities to be more efficient in how we provide programs and services

DESIGN WITH CARE

Obviously, budget reduction causes intense organizational stress. Thus, it is a critical step to design communication plans with care, provide regular updates and anchor decisions within values. In

our case, we held no illusion that we would avoid all internal criticism, but we were confident that the mission discernment tool would help provide a consistent framework for our decisions. This in turn helped us to articulate the fuller meaning and implication of our values.

By definition, values are those qualities of attitude or behavior we consider important. As a Catholic organization, we hold six core values of critical importance that define who we are. These values should govern all our behavior, attitudes, actions and decisions. Our values are the means by which we make our mission tangible in practical and everyday ways. They are the intersection between what we say we are as an organization, and what we do.

Though it was a trial by fire, we found our mission discernment tool helped leaders to examine all the relevant factors and weigh different options against the entire set of our core values.

We believe when talking about values, everyone needs to move beyond stereotypes and platitudes. Values are dynamic and powerful forces in an organization that will drive decision making, consciously or not. They are interconnected, with multiple values frequently underlying any one given situation. It is in these circumstances especially that good discernment, informed by the organization's values, is needed. Through discernment, leaders not only apply Covenant Health's values to specific decisions. They also communicate the enduring importance of our values in creating the organization's culture.

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NOTES

1. See the Covenant Health discernment tool in .pdf format at <http://www.covenanthealth.ca/about-us/missiondiscernment.html>
2. The Covenant Health mission, vision and values statements, as well as code of conduct, mission awards process and mission integration toolkit are available at <http://www.covenanthealth.ca/about-us/mission-vision-values.html>
3. Gerald A. Arbuckle, SM. "Nine Axioms for Success in Mergers: Health Care Leaders Must Take Great Care with the Cultural Factors Involved." *Health Progress* 84, no. 1 (January-February, 2003): 38-42, 60.
4. Under Canada's publicly funded health care system, funding is the responsibility of the province — in Covenant Health's case, Alberta.

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