



**CATHOLIC HEALTH ASSOCIATION**

## Ministry Identity Assessment

The Catholic Health Association is undertaking an initiative to articulate a framework for ministry identity that includes the rationale, core elements of (Catholic) ministry identity, development of key performance indicators, an assessment process and an ongoing improvement plan.

The tool is currently being beta tested and will be available widely in Fall of 2018.





*Covenant Health was honored to be one of the pilot systems involved in the shaping of some of the thoughts in this publication. Our discussions have been collaborative in nature, and quite frankly, inspirational. The tool itself is important for mission improvement, and the process gave us the opportunity to engage appropriate stakeholders and gain depth in our understandings of the many ways mission is alive today.*



**DAVID R. LINCOLN**

*President and Chief Executive Officer,  
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## BACKGROUND

In 2016, CHA convened a meeting of Sponsors, CEOs and system mission leaders to discuss how we maintain and assess ministry identity in our Catholic health organizations. CHA was asked to identify the essential elements that should be part of any ministry identity assessment process and offer some key performance indicators (KPIs) that would demonstrate the organization is operating, caring and making decisions based on its identity as a ministry of the church.

The foundation of the assessment process is CHA's "Shared Statement of Identity" and its seven core commitments which are: acting as a ministry of the church, promoting and defending human dignity, attending to the whole person, promoting the common good, caring for people who are poor and vulnerable, acting on behalf of justice and stewarding resources. For purposes of the assessment process, the order and wording of the core commitments were slightly modified to emphasize the importance of acting in consonance with the church especially in adherence to the *Ethical and Religious Directives for Catholic Health Care Services* (ERDs).

The CHA Ministry Identity Assessment offers several KPIs for each core commitment with a scoring system that can be used by internal and external reviewers. Some of the performance indicators are fundamental to Catholic health care — such as how sacraments are made available to patients and residents and how charts are reviewed to assure ERD compliance. Other indicators are more aspirational and intended to stretch the ministry to see identity within the "signs of the times." One example is how we deal with the imbalance between the compensation and benefits of the highest and lowest paid associates within the organization.

The assessment process involves all levels of the organization in discussing and scoring the organization's performance based on the data



There are multiple ways and approaches that we can use. Some of them are more informal, some of them are formal. I think the fact that we're committed to understanding who we are, and how that's lived out fully, in terms of our Catholic identity, is what's most important and essential to keeping this ministry alive and vibrant.

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gathered for the key performance indicators. An organization has the option of inviting an external reviewer to be part of the assessment process. CHA could potentially arrange for an assessment team comprised of other members of the ministry to participate and verify or modify the findings.

The assessment process is not prescriptive, nor is it intended to supplant assessment processes and tools already in use by some in the ministry, including assessments by outside vendors such as the Veritas Institute's Catholic Identity Matrix, CHAN Healthcare, or audits by other outside institutions. The CHA process can be used in acute, long-term and other non-acute care settings at the facility, regional or system levels. Each organization can determine which or all of the seven core commitments it will use in the process, as well as the KPIs that will give the best data for a meaningful assessment.

The overall goal is continuous quality improvement in ministry identity, so the assessment process ends with the creation of an ongoing improvement plan with regular measurement and reporting.

MINISTRY ELEMENTS

EXECUTIVE SUMMARY

The CHA Ministry Identity Assessment offers over 100 possible KPIs for a variety of care settings (e.g. acute, long-term care, clinics, etc.). Several KPIs are listed for each of the core commitments. The KPIs fall into two categories: measures of the core commitment related to patients, residents or community members, and measures that relate to associates, clinicians and the organization. Each organization determines which of the seven core commitments, or all, will be used in their assessment process, as well as the appropriate KPIs. Here is a summary of the types of KPIs used in the CHA assessment process:

**1 Act as a Ministry of the Church**  
The call to live our identity in concrete ways and connect to the broader church is critical to maintaining our identity. The key performance indicators for acting as a ministry of the church involve the way the organization remains connected and in consonance with the local ordinary and other Catholic entities in the community. The provision of sacraments, spiritual care, signs and symbols of the faith as well as alignment with the *Ethical and Religious Directives for Catholic Health Care Services* of the Catholic Church all play a part in determining the maturity of this core element. Finally, the existence and effectiveness of robust ongoing formation opportunities at multiple levels of the ministry is critical for the long-term ministry identity.

**2 Promote and Defend Human Dignity**  
A critical element of Catholic identity is the commitment to cherish, promote and defend human dignity. Made in the image and likeness of God, each person is a treasure and each life is a sacred gift. The key

performance indicators around promoting and defending human dignity invite ministries to consider how and to what extent they include the patient voice in care planning and meeting the diverse needs of those served. At the internal level, retention and engagement are among the indicators that those who serve in our ministries feel valued and cherished.

**3 Attend to the Whole Person**  
Catholic health care affirms every person is a unity of body, mind and spirit. When we attend to the whole person, we strive for the best care possible to meet their physical needs without neglecting their spiritual needs. Hardwired processes that screen for behavioral, emotional and spiritual needs, facilities that are welcoming and promote healing and prayer, connection to local clergy, as well as palliative care and end-of-life resources are among the indicators that witness to our care for the whole person. The presence and maturity of just leave policies, workplace spirituality programming and attention to co-worker engagement can reveal how well we are attending to those with whom we serve.

2016

JANUARY  
Members request CHA develop a common set of core elements for assessing Catholic identity

FEBRUARY  
CHA convenes a committee of mission leaders and ethicists from around the county

JULY  
Task force formed to develop framework for including common core elements and assessment process

2017

NOVEMBER  
Subcommittees develop the framework



**FOR ADDITIONAL INFORMATION  
AND TO ACCESS A VIDEO, VISIT:**

[chausa.org/mission/cha-ministry-identity-assessment](http://chausa.org/mission/cha-ministry-identity-assessment)

**4**

**Promote the Common Good**

Created by a God of relationship, we do not thrive in isolation. Protecting and promoting the common good for our patients, residents and the communities we serve involves staying active in local partnerships that seek to enhance local social determinants of health. The extent to which we remain in communication with those we serve, eliciting their needs and ideas for solutions, is a key performance indicator. On the co-worker side, we must consider the ways we support each individual's ability to fulfill her/his potential and help all community members do the same.

**5**

**Care for People who are Poor and Vulnerable**

Jesus clearly demonstrated his love for people who are poor and vulnerable. So too, we pay attention to our neighbors who are poor, underserved and most vulnerable. Possible key performance indications for this core element include how we integrate an understanding of the social determinants of health in our service to at-risk communities, to what extent we collaborate with others in our community on shared issues and how we educate ourselves to manage our own biases. Knowing that some of those with whom we serve are among the at-risk members of our community, we must consider our compensation and benefit structures.

**6**

**Act on Behalf of Justice**

We work together to bring alive the Gospel vision of justice and peace interpersonally, within our organizations, for our patients and for our communities. To do so we might consider the extent to which we advocate at all levels of political life and the ways we ensure our decisions are made in the best interest of the communities we serve. When we make mistakes, the ways in which we disclose and redress those persons impacted should witness to our Catholic identity.

**7**

**Steward Resources**

Our mission stands as an enduring sign of health care rooted in faith in Jesus Christ. We steward more than buildings and bottom lines. We steward the legacies of those who have gone before us in this ministry. The extent to which formation is integrated within the organization, the ways in which we respond to the needs of our communities, our efforts for environmental sustainability and socially-conscious investing, as well as the way in which we make choices can all bear witness to the legacy we have received and strive to pass on.

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**JANUARY**

Sponsors, CEOs and system mission leaders affirm work of the task force

**APRIL**

Pilots use CHA's Ministry Identity Assessment

**JUNE**

Results of pilots presented at a breakout session at the 2018 Catholic Health Assembly in San Diego, June 11.

**FALL 2018**

Ministry Identity Assessment resource available

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