

A TOOL FOR EVALUATION

The following process can be used over a period years by the Sponsor or Board to discern how well the organization is doing in terms of living its mission as a Catholic health provider. The tool is best used in a facilitated process that seeks participation from a wide range of people. A Summary of another sample tool – The Values Integration Assessment – developed by the Catholic Health Association of Ontario, the New Brunswick Catholic Health Association and the Catholic Health Association of Canada is included in the Appendix and is presented as an additional and alternative approach.

***A Work in Progress:
Indicators for Catholic Health Care Organizations
as stand-alone or partners with the public sector.***

Tom Maddix, CSC, D. Min.

The “Work in Progress” is an attempt to identify the essence of Catholic identity within organizations called Catholic whether they be part of partnerships with public facilities or as stand alone facilities. The “Work in Progress” creates behavioural and perceptual indicators for the four major characteristics of Catholic identity, *Mission, Sponsorship, Holistic Care and Ethics*, as popularized by Catholic Canon Lawyer Frank Morrisey, OMI, of St. Paul’s University in Ottawa and included in an unpublished document “A Perspective on How to Approach Catholic Identity in Changing Times: A Working Document” prepared for the Catholic Health Association of the United States in 1994.

THE PROCESS

The indicators outlined focus upon specific behaviours and/or perceptions flowing from a defining characteristic of Catholic organizational identity or culture. The process is simple. Read the question, trust your intuition and circle the response, 5-1 or Do not know, which best reveals your experience. When you have done each section, there are a series of questions to help you and your organization to reflect upon your perceptions and plan for the future.

The material included in this tool can be used over a period of 2 or 3 years and is best executed through facilitation.

THE FOUR ELEMENTS

Mission: As Catholic organizations we continue the healing mission of Jesus as a means of revealing God's love and presence in the world.

1. Employees, Volunteers and Board Members are introduced to the Mission and Values as part of their initial orientation.

a. The history

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

b. The vision

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

c. The core values

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

d. The mission, values and spirituality of the sponsor of the faith-based organization

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Employees, Volunteers and Board Members understand how the various mission and value structures of the organization (s) impact their particular roles and responsibilities.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. All employees and board members periodically participate in mission and values-based leadership development program which helps them to integrate the cultural diversity of the organization (s) into lived realities based upon the organization's shared core values.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Mission and Values of the organization (s) are integrated into:

a. Celebrations

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

b. Rituals

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

c. Educational programs

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

d. Strategic Plans

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

e. Performance Evaluations

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. People within leadership positions in our organization (s) understand the value of Catholic health care and demonstrate it by their participation in workshops, conventions and leadership programs that seek to promote and deepen Catholic identity and culture.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. We create an environment that nurtures and affirms spirituality.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. CEOs, senior leadership and managers understand their role in creating mission-driven organizations within the context of a faith-based community.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. A person whose main concern is integrating the mission of the organization(s) participates in all senior level decision-making groups.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. People recognize us as a Catholic organization.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Appropriate symbols and artwork reveal the spirituality and values of the sponsoring faith tradition.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. As members of the Catholic organization we understand our relationship with the local bishop.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please respond to the following questions:

1. Areas of strength are?

2. Areas where more growth is needed are?

3. Our Priorities for the next 12 months in this particular area are:

Sponsorship: As an official ministry of the Catholic Church, sponsorship defines the norms and forms of accountability between the sponsor/owner and the local organization.

- 1 Board members and leaders understand their relationship to the sponsor/owner of the Catholic organization.

DK		2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. The history, mission and spirituality of the owner/sponsor are highlighted within the facility so that all understand the formative roots of the facility.

DK		2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Sponsors feel at ease visiting us.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Board members and Senior Management work well with the owners/sponsors and keep them well-informed on issues that impact their particular corporate responsibilities.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Being part of faith-based organization and/or partnership is important to our civic community.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Accountability responsibilities are well integrated into the relationship between the sponsor/owner and local organization.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Board members and senior leaders understand the reserved powers of the sponsor/owner.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please respond to the following questions:

1. Areas of strength are?

2. Areas where more growth is needed are?

3. Our Priorities for the next 12 months in this particular area are:

Holistic Care: Grounded in the belief that all people are created in the image of God, holistic care attends to the needs of the body, soul and mind in an integrated manner. Holistic care is rooted in the dignity of the person and a belief that God dwells among and within us.

- 1 Programs demonstrate a commitment to the whole person: body, mind and soul.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Programs of spiritual care are well-funded and staffed.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Our organizational decisions ask, "How do our policies reflect holistic care"?

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. People in our organization (s) work well together.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. We promote the health and wellness of all those we serve.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. A strong atmosphere of compassion and concern permeates our ministry.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Employees are treated with respect.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Leadership and employees trust one another.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. We value and promote diversity at all levels.

DK	2	3	4	5	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. We encourage new ideas.

DK	2	3	4	5	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. We recognize the importance of a balance between work and leisure for all employees.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please respond to the following questions:

1. Areas of strength are?

2. Areas where more growth is needed are?

3. Our Priorities for the next 12 months in this particular area are:

Ethics: Clinical, Social and Organizational Ethics within a Catholic health organization finds their roots in the Gospel and the teachings of the Catholic Church. Organizations, that call themselves Catholic, integrate the values of the Gospel and Catholic ethical teaching into all levels of the organization.

- 1 Understanding the Health Ethics Guide for Catholic health care organizations is of prime importance for everyone in our organization.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Responding to the needs of the poor and voiceless is an active part of our ministry.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Employees are involved in decisions that impact their work.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Employees and Ethics Committees use the Health Ethics Guide as the primary resource in responding to questions of clinical, social and organizational ethical issues.

DK		2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. The values and mission of the organization (s) are integrated into all decisions.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. We demonstrate high levels of compassion and integrity in our decision-making and implementation.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Issues of resource allocation and human resources are viewed through the lens of Catholic social teaching and the common good.

DK		2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. We are perceived as a just organization by:

- **Employees**

DK		2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **The public**

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. On-going programs that highlight ethical decision-making, reflection and understanding are part of our on going educational programs.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. We provide programs for patients, residents, staff and families dealing with end of life issues from a faith based perspective.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. We recognize that individual, institutional and societal interests are often in tension; in every case we strive to discern how the good of the whole can be served.

DK	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please respond to the following questions:

- **Areas of strength are?**

- **Areas where more growth is needed are?**

Our Priorities for the next 12 months in this particular area are:

Glossary of key terms

Canon Law is the law of the Catholic Church

Church represents the “people of God,” a community of people with shared faith and practice. In the Catholic Church the bishop is the head of a geographical area called a diocese.

Health Ethics Guide, a document approved by the Canadian Conference of Catholic Bishops, provides a comprehensive overview of organizational, social and clinical issues for Catholic health and social services. The *Guide* provides guidance to Catholic organizations in relation to carrying out the health care ministry in a manner consistent with the moral and ethical teachings of the Catholic Church. The *Guide* is published by the Catholic Health Association of Canada.

Mission, Values and Culture provides the visible and tangible expressions of beliefs, principles and assumptions and represents a concrete expression of the organization’s purpose and scope of service.

Organizations represent arrangements for delivery of services, i.e. the organization for health delivery.

Public Juridic Person is a Catholic corporation responsible to a diocese or the Vatican (pontifical juridic person).

Sponsor: the agent who carries out the responsibility of sponsorship of Catholic health care. The responsibilities of the sponsor are carried out through such usual reserved powers as: approving the mission and values of an organization, appointment of the board of trustees/directors and whatever else is identified in its act of incorporation.

Sponsorship defines the relationship, responsibility, moral accountability, support and influence and public identification between the health organization and the Catholic sponsor. It also reflects the fiduciary responsibility with the Catholic Church for apostolic works i.e., health care etc.

- Sponsorship: formal reservation of canonical control by juridic person for an incorporated ministry. (Mary Kathryn Grant, Catholic Health Association-USA)

Stewardship represents the holding in trust that which we do not own.

The institution/organization/facility represents the infrastructure and core processes (mission/value assessment and discernment), which embody mission integration accountability linked with individual accountability through performance management.

Acknowledgments

- Alberta Catholic Health Corporation: Edmonton, AB
- Catholic Health Association-USA: St. Louis, MO
- Catholic Health Association of Canada: Ottawa, ON
- Catholic Health Association of Ontario, Oakville, ON
- Catholic Health Initiatives: Denver, CO
- Holy Cross Health Care System: South Bend, IN
- Hospital Hotel-Dieu Grace Hospital, Windsor, ON
- Marianhill, Pembroke, ON
- Religious Hospitallers of St. Joseph Health System: Kingston, ON
- Providence Centre, Scarborough, ON
- Providence Continuing Care Centre, Kingston, ON
- Providence Health System, Sisters of Providence of St. Vincent de Paul: Kingston, ON
- Sault Area Hospitals, Sault Ste. Marie, ON
- St. Joseph Health System, Hamilton, ON
- St. Joseph Health System: Orange, CA
- St. Michael's Hospital: Toronto, ON

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Challenges and Competencies: The Theological and Spiritual Aspects of Catholic Healthcare Leadership, John Shea, STD, *Health Progress*, January-February 2000.

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Health Ethics Guide, Catholic Health Association of Canada, Ottawa.

Healthcare Ministry: Refounding the Mission in Tumultuous Times. Arbuckle, Gerald A. (The Liturgical Press, Collegeville, MN) 2000

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Resource Allocation in the Healthcare Sector: An aid for ethical decision-making. Catholic Health Association of Canada, Ottawa

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Web Sites of Catholic Health Association of Canada as well as the Catholic Health Association of the United States.