A TOOL FOR EVALUATION

The following process can be used over a period of 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as popularized by Catholic Canon Lawyer Frank Morrisey, OMI, of St. Paul's University in Ottawa and included in an unpublished document “A Perspective on How to Approach Catholic Identity in Changing Times: A Working Document” prepared for the Catholic Health Association of the United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

   b. The vision

   c. The core values

   d. The mission, values and spirituality of the sponsor of the faith-based organization
2. Employees, Volunteers and Board Members understand how the various mission and value structures of the organization(s) impact their particular roles and responsibilities.

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.

4. Mission and Values of the organization(s) are integrated into:
   
   **a. Celebrations**
b. Rituals

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c. Educational programs

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d. Strategic Plans

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e. Performance Evaluations

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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.

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

7. CEOs, senior leadership and managers understand their role in creating mission-driven organizations within the context of a faith-based community.
8. A person whose main concern is integrating the mission of the organization(s) participates in all senior level decision-making groups.

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DK   1   2   3   4   5
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9. **People** recognize us as a Catholic organization.

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DK   1   2   3   4   5
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10. Appropriate symbols and artwork reveal the spirituality and values of the sponsoring faith tradition.

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DK   1   2   3   4   5
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11. As members of the Catholic organization we understand our relationship with the local bishop.

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DK   1   2   3   4   5
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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.

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.

3. Sponsors feel at ease visiting us.
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.

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

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

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

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

   DK  1  2  3  4  5

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

   DK  1  2  3  4  5
4. People in our organization(s) work well together.

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

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

7. Employees are treated with respect.
8. Leadership and employees trust one another.

9. We value and promote diversity at all levels.

10. We encourage new ideas.

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

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

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

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

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

7. Issues of resource allocation and human resources are viewed through the lens of Catholic social teaching and the common good.
8. We are perceived as a just organization by:

- Employees

  1. Employees  2. The public

- The public

  1. Employees  2. The public

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

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

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.
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• 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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