Reflections on Catholic Identity Matrix:

A CEO’s Perspectives

by

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This case study reports on the experiences of the Genesys Healthcare System in using the Catholic Identity Matrix (CIM) developed by the SAIP Institute at the University of St. Thomas to measure and improve its approaches and deployment of its Catholic Values. This presentation describes the institutional characteristics of Genesys, why the organization elected to use the CIM to measure its Catholic identity, the findings from its CIM’s assessment and what actions were taken because of these findings.

The Genesys Healthcare System, a Ministry within the Ascension Health system, is a highly integrated health care delivery system providing care for approximately 500,000 people residing in central Michigan. It is a highly evolved and innovative system formed by the merger of one Catholic and three secular hospitals in the mid-1990’s. The System uses cutting edge physician integration and care delivery models to produce remarkable high levels of quality at approximately 27% less cost than other health care providers. Genesys is also deeply committed to using process improvement and the Baldrige National Quality Criteria to drive even greater performance. It was because of this familiarity with the Baldrige program that made the CIM was identified as an effective tool for Genesys’ ongoing development as a Catholic healthcare system.

Genesys’ objectives in using the CIM were to assess the maturity and completeness of its deployment of its Mission, Vision and Values in particular as they relate to effectively addressing its social responsibilities as a major employer in its region. Additionally, it was hoped the CIM would identify new approaches to integrate the Mission, Vision and Values into the organization’s key processes and operations. Finally, it was recognized the CIM would provide a unique means to quantify the maturation of Catholic identity within this merged System and provide a consistent means for future measurements and comparison to other health systems.

Genesys prepared for the CIM’s assessment in 2008 by providing specific training on the CIM and the Catholic Social Teachings for the staff who would be participating in the assessment. The organization also used this preparatory time to gather the documentation which would be used to make the assessment. Approximately 200 man hours were needed to complete preparations for the assessment.
The actual assessment was made in early 2009 and it was performed by representatives of the SAIP Institute and Ascension Health.

There were several surprises in the final measurements both in terms of how high or low performing Genesys was on any one of the elements of the assessment. However, following study of the results three institutional patterns presented themselves as key opportunities for improvement. Specifically, there were high leverage improvement opportunities in all the CIM elements associated with “Training” as well as for “Alignment” associated with Solidarity for those in Poverty and the “Impact” element for Participatory Community of Work and Mutual Respect. Based on these findings specific new approaches were created by the System to improve these areas of Catholic Identity.

While there have been many new approaches deployed across Genesys as a result of this CIM assessment several initiatives stand out as particularly innovative or impactful, including:

In Training:

- A new Mission Statement was drafted with input from staff and physician. This new Statement was approved by the Board of Trustees as the system-wide Mission Statement describing the sole purpose of each corporate entity within Genesys,
- On-boarding programs for staff and physicians were changed to provide a specific focus on the System’s Mission, Vision and Values including how each person at Genesys is called upon to fulfill these values,
- Values training was included as part of the workstream integration for the improvement of the System’s Patient Experience improvement initiatives.

In Alignment with those in Poverty:

- The population-based care delivery model (HealthWorks) which had previously only been used for the insured population was expanded to include 25,000 uninsured residents served by Genesys. This includes the use of individual health assessments and health navigators to help these uninsured people achieve their specific health goals,
- This care delivery model, HealthWorks, was elevated as one of the four major elements of Genesys’ strategic plan,
- Genesys, in collaboration with other community organizations including Labor, Education, Governmental agencies and Business, drafted and passed the first community based resolution calling for Universal Access to health care across the United States.

In Impact in Participatory Community of Work and Mutual Respect:

- Physician joint venture, co-management companies were created to manage key clinical service lines in the hospital with goals aligned with the clinical, business and value-based mission of the System,
- The staff performance evaluation process was re-created to include performance measures related to both operational and values-based performance,
• The discernment process was incorporated into the performance improvement “tool box” of the System to be used along with other process improvement tools such as Six Sigma and LEAN.

In addition to the findings and improvement actions noted above, Genesys gained several other learnings from this CIM’s assessment. These important learnings include:

• The preparation for the CIM is as valuable as the assessment itself. This is because the broad based investigation to find policies and practices that support the organization’s Catholic identity enriches and deepens the participants understanding of the purpose and reason for these policies,

• It is important that Mission be integrated into the organization’s key processes, not just “bolted on” as if they were separate and distinct from other clinical and business practices,

• The process of assessing Genesys’ Catholic Identity has helped it move from a mindset of simply doing uncoordinated good acts to a new focus of creating approaches that cause good acts to happen. These good acts can be carried out by Genesys or by the many other community organizations with which Genesys interacts with to improve the community,

• In assessing and creating new approaches to improving the organization’s Catholic identity it is important to include in your scope of work all the individual involved in that work. This includes both physicians, volunteers as well as the paid staff otherwise the work will be silo’ed and inconsistently deployed across the organization,

• In improving the organization’s Catholic identity it is important to measure the impact its programs have had on the community and its health measures and not simply measure the acts themselves,

• Finally, there is the recognition that improving Catholic identity is not about creating one sure intervention that can “fix” the organization’s identity for all time. Rather, these improvements are best thought of as cycles of improvement which overtime create a mature Catholic organization which is more fully attuned with the Church’s long standing Values.