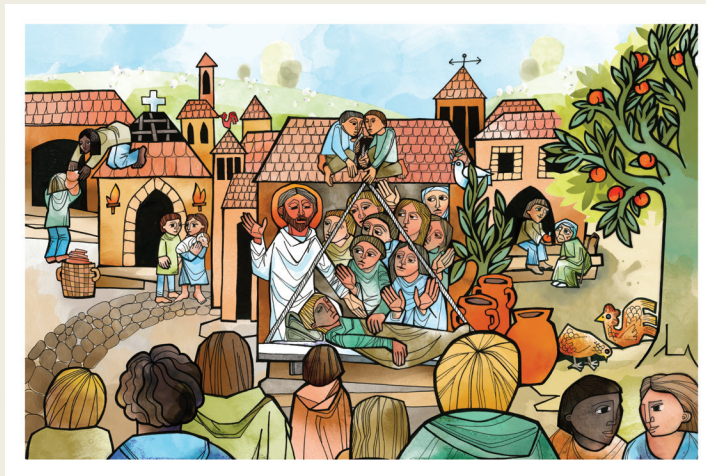




Ministry Identity Assessment

A Dynamic and Comprehensive Online Platform





THE IMPORTANCE OF ASSESSING MINISTRY IDENTITY

In 1965, the bishops of the world wrote the *Pastoral Constitution on the Church in the Modern World* at the Second Vatican Council. They reminded us, “The Church has always had the duty of scrutinizing the signs of the times and of interpreting them in the light of the Gospel...” For the healing ministry to endure and flourish, we must continue to ask: What are the signs of the times in health care today? How do we interpret them in the light of the Gospel, and how do we act in a way consistent with our identity?

Since 1977, the Catholic Health Association has been engaged in articulating what are the objective criteria for assessing the effectiveness of Catholic health care facilities as ecclesial organizations. Gospel principles and Catholic social teaching have always been the foundational values by which we assess ourselves.

While the underlying values of Catholic health care have not changed, the health care environment in which we operate, the types of partnerships we are entering, and our models of sponsorship have.

CHA MINISTRY IDENTITY ASSESSMENT

The *Ministry Identity Assessment* is a comprehensive tool using the core commitments of the Shared Statement of Identity for the Catholic Health Ministry and the Baldrige Health Care Criteria for Performance Excellence. The assessment enables ministry systems and facilities to evaluate their policies, practices, community partnerships, and treatment of patients/residents and caregivers utilizing the agreed-upon criteria for Catholic health for Catholic health care excellence as represented in the core commitments.



Bon Secours Mercy Health was honored to be one of the pilot systems involved in the updated web-based version of CHA's Ministry Identity Assessment. Our discussions have been collaborative in nature, thought-provoking and quite inspirational. The tool itself is formative and important for mission improvement. It revealed areas of commendation and recommendation. Through this process we identified how to measure key aspects of our Catholic identity, had the opportunity to engage appropriate stakeholders and gain depth in our understanding of the many ways our mission is alive today.

AMY MARCUM

Chief Mission Operations Officer, Bon Secours Mercy Health



Dear Colleague,

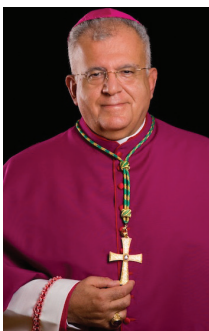
CHA is pleased to share with you the renewed *Ministry Identity Assessment* presented in a state-of-the-art digital platform. The development process of this exciting tool began 24 months ago in deep consultation with the membership and entailed many revisions and rigorous piloting with 15 facilities representing two member systems.

This renewed assessment tool is the second edition of CHA's *Ministry Identity Assessment* which launched in 2018. The creation of the CHA assessment is an extension of the work that began following a 2016 "Critical Conversation" gathering of CEOs, sponsors and mission leaders. The importance of maintaining institutional integrity and ministry identity in the face of rapidly changing health care delivery was the conversation's focus. CHA was tasked with identifying essential elements for a ministry identity assessment process and offering key performance indicators to demonstrate an organization's alignment with its identity as a ministry of the Church in terms of patient care, operations, and decision-making. Both the 2018 and 2023 versions of the CHA *Ministry Identity Assessment* were designed with input from task forces representing Catholic health leaders in mission, ethics and operations. I am grateful to all ministry colleagues who contributed time, talent and expertise to ensure the exceptional quality of the renewed *Ministry Identity Assessment*.

As you embark on this exciting journey of assessing your ministry's identity using the seven core commitments found in CHA's *A Shared Statement of Identity* and the Baldrige Maturity Framework, I am confident you will identify many opportunities to celebrate your success as you develop plans for continuous quality improvement.

Sr. Mary Haddad, RSM

President and Chief Executive Officer



I have reviewed the CHA Ministry Identity Assessment and the results gathered from the four pilot sites. I am impressed by the level of honesty and transparency the key performance indicators require. Looking at the daily operations and decisions of the health ministry from the lens of CHA's core commitments will make the mission and values of Catholic health more relevant for all involved in the process. Finally, seeing ministry identity as part of an organization's continuous quality improvement is an excellent way to assure accountability and fidelity to the mission of the Church. I heartily endorse the CHA Ministry Identity Assessment.

ARCHBISHOP J. AUGUSTINE DINOIA

Adjunct Secretary Congregation for the Doctrine of the Faith

MINISTRY IDENTITY ASSESSMENT PROCESS OVERVIEW

PRE-ASSESSMENT WORK

There is a certain amount of work and consideration to be done in advance of a formal process, namely that the facility, region or system affirms the value of an assessment process and commits to a timeframe. Critical pre-work involves weighing the pros and cons of an internal, external or combination assessment, and getting top-level participants engaged.

MEETING ONE

Senior Leadership Team

This meeting includes the Senior Leadership Team (SLT). Before gathering, SLT should have looked at the overview of the Ministry Identity Assessment process. This meeting has seven high-level objectives that set the tone, timing and participants for the process.

OBJECTIVES

- ✦ Explain the CHA Ministry Identity Assessment
- ✦ Determine if external reviewers will be used
- ✦ Decide the timing for the process
- ✦ Agree on core commitments to be reviewed

In general, the core commitments for assessing identity are determined by the system. In smaller systems or individual facilities, the mission leader and SLT may decide.

- ✦ Determine key stakeholders to inform and possibly involve in the assessment
- ✦ Determine members of the Steering Team
- ✦ Identify Core Commitment Committee (CCC) chairs – how many committee chairs to name is determined by which core commitments you review and if you group any of them under one CCC.

These individuals should have a role with natural alignment with the core commitment being reviewed. CCC chairs are a part of the steering team.

It is a good idea at this point to begin thinking about a communication plan to inform key internal and external stakeholders (including the local bishops) about the purpose of the ministry identity assessment process, what will be assessed, who will be involved and how and when they will receive results. Getting an idea of what the local ordinary is curious about has worked well in building relationships.

MEETING TWO

Steering Team

Made up of 12 to 15 people, the Steering Team drives much of the process and is responsible for final scoring, reporting, process improvement and action planning. In addition to the project management dyad, CCC chairs, and a recorder, membership of this team might include: the top administrator of the facility, representation from the SLT, board, community, front-line associates, quality and process improvement, accreditation, communications or other key stakeholders.

OBJECTIVES

- ✦ Confirm core commitments
- ✦ Identify possible data sources and benchmarks
- ✦ Determine if/how feedback will be gathered from associates
- ✦ Create CCCs
- ✦ Determine key dates

Core Commitment Committees

CCCs are made up of three to seven people, plus recorder. These individuals are responsible for collecting and reviewing the data for the maturity levels of the core commitment. Together they come to consensus on an initial score as well as offer a summary of strengths, weaknesses and suggested actions for a core commitment.

MEETING THREE

Steering Team and CCC Formation Day

Involving both the Steering Team and all CCC members, Meeting Three provides scriptural and theological underpinnings, as well as a practical introduction to the Baldrige scoring process. This session includes various formation and training videos, reflection, discussion and dialogue, as well as a commissioning service.

OBJECTIVES

- ✦ Explain ministry identity assessment process and underpinnings to the Steering Team and CCC through a formative process.
- ✦ Illustrate connection between ministry assessment and continuous quality improvement.
- ✦ Ensure all participants understand the Baldrige scoring process.
- ✦ Commission all participants so they recognize their work as essential to the identity of the organization.

MEETING FOUR

Core Commitment Committee Formation Day

Each CCC meets as a small group to unpack the theological commitments around their particular core commitment, what data needs to be collected for particular maturity levels and who will be responsible for doing the work.

OBJECTIVES

- ✦ Engage the CCC in a formative process around the theological foundations of the assessment process and of the core commitment in question
- ✦ Introduce their core commitment and make suggestions as to what data supports the various maturity levels
- ✦ Assign members the maturity levels they are responsible for and what data they will collect.

- ✦ Determine date by which data is to be uploaded to the virtual platform
- ✦ Refamiliarize members of the CCC with the Baldrige Maturity Framework, Scoring Guides and related resources

The significant work of data collection and submission will happen between Meeting Four and Meeting Five. CCC members collect their data and upload it to the virtual platform by the due date. This process should take two to four weeks.

After all of the data is collected and uploaded to the virtual platform, it will be available to all committee members for review. CCC members should have at least a week to review this data and come to Meeting Five prepared to discuss.

MEETING FIVE

Core Commitment Committee Assessment Day

CCCs meet individually to discuss the data and come to consensus on a score. At the end of this meeting, participants complete a Process Assessment and Confidence Survey, the results of which are automatically compiled and shared at Meeting Six.

OBJECTIVES

- ✦ Come to a consensus score for each core commitment maturity level
- ✦ Identify strengths, gaps, opportunities and recommendations for improvement.

After this meeting, the CCC chair and project management dyad prepare to deliver a high-level report for the Steering Team. These reports, as well as the Process Assessment and Confidence Survey Summaries, are automatically generated on the virtual platform and available for the Steering Team and External Reviewers (if appropriate) for review in advance of Meeting Six.

MEETING SIX

Steering Team Assessment Day

Having reviewed scoring summaries and confidence survey summaries from each CCC, the Steering Team gathers again to hear reports from each CCC chair and confirm or amend the initial score.

OBJECTIVES

- ✦ Review core commitment scores and reports
- ✦ Determine final scores for each core commitment
- ✦ Identify top strengths, opportunities and recommendations

If External Reviewers are joining the group, they are expected to:

- ✦ Inquire about important data that are not mentioned in written scoring summaries or verbal reports by the CCC chair and ask what evidence the organization found related to these areas
- ✦ Ensure the Steering Team finalizes the core commitment scores in a manner consistent with the Baldrige Scoring Process
- ✦ Participate in the conversation where trends are noted as well as naming the organization's strengths, opportunities and recommendations for continuous quality improvement in ministry identity
- ✦ They ought not to be serving as a recorder for the group, beyond their own needs, facilitating the meeting or assigning scores.

Please note: Within two weeks of Meeting Seven, the top opportunities for improvement should be determined for inclusion in the Action Plan Summary and provided to the project management dyad for their use in preparing for Meeting Seven.

MEETING SEVEN

Process Improvement and Reporting Day

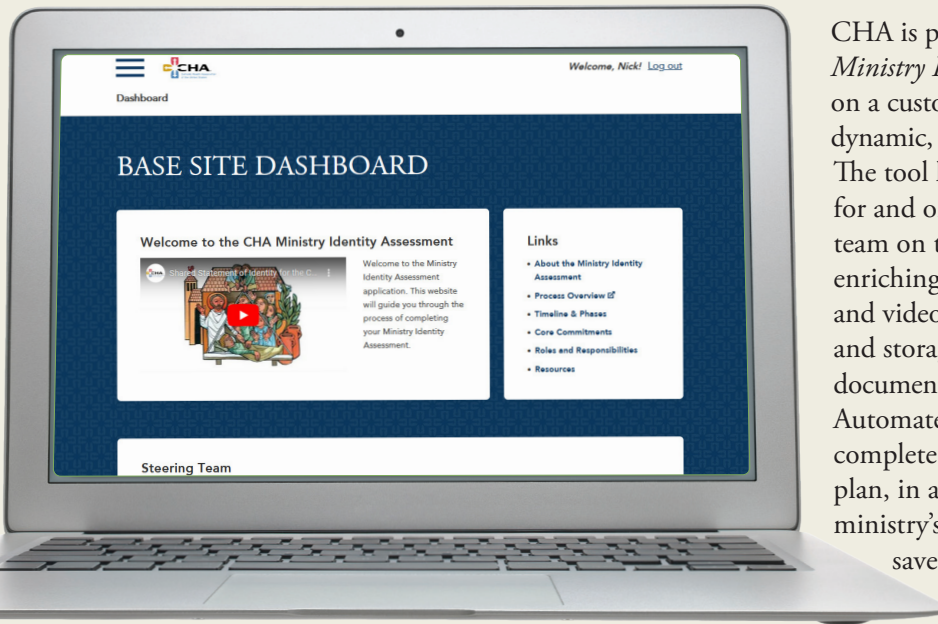
With final scores and the top opportunities for improvement in hand from Meeting Six, selected members of the Steering Team, CCC chairs and other people from the organization identified during the Steering Team Assessment Day gather to develop a process improvement plan.

OBJECTIVES

- ✦ Develop a process improvement plan for ministry identity
- ✦ Determine responsible parties for each action plan
- ✦ Decide metrics and reporting frequency
- ✦ Summarize process improvement plan for final report

Organizations are encouraged to consider who will monitor progress toward goals as well as what existing structures may be meaningful places to embed reporting processes.

ABOUT THE NEW MINISTRY IDENTITY ASSESSMENT ONLINE PLATFORM



CHA is pleased to introduce the new *Ministry Identity Assessment*, now available on a custom-created virtual platform that is dynamic, all-inclusive, and user-friendly. The tool has everything you need to prepare for and organize meetings, and train your team on the assessment process, including enriching meeting agendas, prayers, resources, and videos. With easy-to-use document upload and storage features, accessing the appropriate documents is simple for all involved. Automated scoring and an auto-generated complete final report, including an action plan, in a template branded with your ministry's logo, maximizes efficiency and saves valuable time.

PRICING

The philosophy of CHA is that membership dues cover the cost of all intellectual property created by CHA content leaders and association workgroups. At times, CHA offerings necessitate the subject matter expertise of outside consultants or vendors. For members utilizing such CHA offerings, the association covers some of the maintenance and upgrade costs by charging users a nominal fee. In addition to the expansive commitment of CHA staff time and creative expertise in establishing the new *Ministry Identity Assessment* platform, CHA has made a substantial strategic financial investment in the subject matter expertise of outside vendors. We believe the pricing reflects the quality of the product and its delivery to the ministry.

Cost

CHA (\$900 per facility/ministry)

Ongoing creative development

Site maintenance and support

Content updates

Web Vendor–Matrix (\$1000 per assessment)

Fund unique website built to assessment site

Payment goes to Matrix



AS THE CHURCH'S MINISTRY OF HEALTH CARE, WE COMMIT TO:

- † Promote and Defend Human Dignity
- † Attend to the Whole Person
- † Care for Poor and Vulnerable Persons
- † Promote the Common Good
- † Act on Behalf of Justice
- † Steward Resources
- † Serve as a Ministry of the Church

THE SHARED STATEMENT OF IDENTITY *for* THE CATHOLIC HEALTH MINISTRY

We are the people of Catholic health care, a ministry of the church, continuing Jesus' mission of love and healing today. As provider, employer, advocate, citizen – bringing together people of diverse faiths and backgrounds – our ministry is an enduring sign of health care rooted in our belief that every person is a treasure, every life a sacred gift, every human being a unity of body, mind and spirit.

We work to bring alive the Gospel vision of justice and peace. We answer God's call to foster healing, act with compassion and promote wellness for all persons and communities, with special attention to our neighbors who are poor, underserved and most vulnerable. By our service, we strive to transform hurt into hope.



Washington Office
1625 Eye Street, NW, Suite 550
Washington, DC 20006
(202) 296-3993

St. Louis Office
4455 Woodson Road
St. Louis, MO 63134
(314) 427-2500

chausa.org