

Beyond the Walls of Catholic Health Initiatives, Mission Integration in Emerging Markets

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Editor's Note: We welcome responses to the article that follows. They may be sent to ethics@chausa.org.

In 2010 Catholic Health Initiatives (CHI) created the role of vice president of mission integration for emerging markets to respond to the evolution of the healing ministry in the United States. With the movement of health care beyond the acute care setting, a need was revealed: how will our mission and core values be integrated into the health care delivery realities before us? From its foundation, CHI has sought new and innovative ways to deliver care and advance the healing ministry. Most recently, CHI has collaborated with global and for-profit companies and created new subsidiary organizations as a means to deliver quality care while also advancing the healing ministry and remaining faithful to our legacy and core values. As we move toward population health management and new delivery models, CHI seeks to integrate mission and foster Catholic identity in these emerging markets.

This article will examine the emerging markets in which CHI serves. We will examine the mission initiatives underway and those that have just begun, highlighting our experience – the important role of mission integration and formation in the design of new business models. We will explore how this integration is ethically informed and also consider the challenges and opportunities we have met along the way. Our goal is to offer a platform of reflection for that which is underway but very much emerging.

Information Technology

Catholic Health Initiatives has entered into a number of partnerships that take advantage of specialized capabilities essential to creating healthier communities. Engaging the expertise of others is vital so we can focus on our core work – delivering health care through our core

values of reverence, integrity, compassion and excellence. One such alliance is with WiPro, a global information technology (IT) leader with more than 30 years of experience and investment in technical services and IT infrastructure.

In 2013, CHI signed a contract with WiPro to deliver IT services to meet our needs presently and into the future. Although our formal partnership began in September 2013, the work to find a suitable partner began years prior.

Faced with revolutionary changes in health care, CHI entered into a discernment process to consider the ethical viability of outsourcing information technology services. This process involved dialogue and reflection, and asked important and challenging questions about the next era of health care. The evaluative criteria are in three categories: sponsorship issues, ethical issues, and some specific social teachings of the church. Questions include but are not limited to:

- Is the proposed venture consistent with our ministry?
- Are there any concerns of a negative impact on CHI's image and "good name"?
- Does this partnership bring unique skills, knowledge, resources or other capabilities that could not be obtained otherwise?
- Will the potential partnership assist CHI to achieve its mission and maintain an appropriate balance between potentially competing objectives of cost, strategy, continuity, access and coverage?
- Are the business partner's practices ethical?

- Are there any violations of the social teaching of the church related to: rights of workers (wages, benefits), labor practices (workplace safety, diversity), environmental protection, human rights (child labor, sweatshops), social or community responsibility (local business support, community benefit)?¹

CHI affirmed the ethical viability to proceed with an external IT vendor. The discernment process and work continued – it also guided the evaluation of potential service providers for technical services. Some were not aligned with our mission and core values and were asked to leave the proposal process. Others presented business and leadership practices compatible with our core values and were explored further. Compatibility of mission and values was a critical component in the evaluation. This was done recognizing that work redesign can result in job loss, and that service providers in this global economy might offer solutions that could move existing jobs out of state and overseas.

A multi-disciplinary CHI team participated in interviews, proposal review, site visits, reference checks and feedback sessions. They evaluated cultural and mission fit, including a commitment to employees, education, community and the environment, as well as business service opportunities that advance our current technology and service capabilities. Eventually CHI affirmed the need and appropriateness of this evolution and chose WiPro as its IT partner.

The work of mission integration with this partner continues beyond the initial inquiry and discernment phase. CHI is also leading

on-site formation/orientation experiences for our IT partners in India. Formation programs at CHI use reflection, dialogue, adult learning, art, music, story and other media to assist participants in discovering and naming their personal values and how these values direct their leadership and life choices. Participants then consider how their personal values may be aligned with the mission and values of CHI. Many participants discover a resonance with reverence, integrity, compassion and excellence, the core values of CHI. These programs are designed through the CHI's Center for Formation in collaboration with the vice president of mission integration for emerging markets and the particular community being served, in this case IT. An interdisciplinary team consisting of IT, human resources and mission collaborate with our vendors to assist them in understanding that they support a healing ministry that spans centuries.

Physician Services

The physician enterprise is another emerging market which CHI serves. As part of the CHI strategy to improve business services supporting ambulatory care, CHI launched a new entity to provide best-in-class physician services: Catholic Health Initiatives Physician Services (internally referred to as CHIPS). CHIPS, a management services organization (MSO) launched in July 2013, is designed to deliver key business functions and physician management services through one centralized organization supporting our ambulatory physician offices nationwide. CHIPS is a CHI majority-owned joint venture in partnership with MedSynergies. MedSynergies is a national physician management services organization and will provide key services

within CHIPS. To accelerate the development of this new entity, CHI has become a minority owner of MedSynergies.

CHI's goal with CHIPS is to become the industry standard for successful physician alignment, strengthening our revenue cycle processes while enhancing patient retention and practice performance. The work to develop CHIPS has been led by T. Clifford Deveny, MD, senior vice president, physician practice management and clinical services. CHI will partner with MedSynergies to provide physician engagement services, practice management, revenue cycle, patient referral and scheduling services, and business analytics. Employees previously providing these services at the local practice level will become employees of CHIPS. This new structure will ensure that employees providing these services are aligned in best practices and are providing compassionate care and business excellence. The move to this new entity will occur in a phased approach in CHI's markets over the next two years.

As with the WiPro initiative, CHI utilized a discernment process to determine the appropriateness of a partnership with MedSynergies. The process revealed a positive outcome in keeping with our identity and mission. The creation of CHIPS is seen as an essential development within CHI, consistent with our legacy of innovation and core values. This new entity has not only brought best-in-class physician services to CHI market-based organizations throughout the country, it has also positioned us to strengthen mission identity with our physician providers. MedSynergies leads an interview process to determine what is working well within the physician enterprise and what needs

improvement. Collaborating with mission integration leaders and the CHI Center for Formation, MedSynergies co-created a physician engagement process in keeping with CHI's mission and core values. The physician engagement process incorporates and advances our mission and core values at every stage: recruitment, orientation, ongoing formation and performance evaluation. Although in the beginning stages, this new partnership is designed to strengthen the physician practice management across CHI. The collaborative efforts have positioned CHI to enter into the next era of health care with a strong, mission focused physician practice management.

Emerging CHI Subsidiary Organizations

In addition to the development of external partnerships, CHI has created strategic subsidiary organizations to meet rapidly changing health care needs and delivery models. These companies are served by a vice president of mission integration for emerging markets who previously served as the system's director of ethics for eight years. The primary areas served include Virtual Health Services (VHS), Consolidated Health Services (CHS) (home care, hospice, transport service, infusion therapy, and durable medical equipment), Payer Strategy and Operations (PSO), the CHI Foundation and Center for Research and Innovation (CIRI).

Many of these organizations are newly forming or engaged in significant transition to meet changing needs. The vice president of mission integration for emerging markets has been able to evolve with these teams - developing relationships, experiencing firsthand the challenges that they are facing and contributing to the work of the groups.

The opportunity to be a part of these teams has been critical in the development of relationships and provides a strong foundation upon which to build and translate the health care ministry into the future. This opens the door to identification of the need for and delivery of mission information and formation opportunities. Many team members are new to CHI. By introducing our legacy and core values through reflections, some participants are informed about CHI's history while others' experience is formative, building upon their own backgrounds and making head, heart and spiritual connections. The same material experienced by different people may be informative or formational. The facilitator's role aids in inviting participants to listen with both their head and their heart, encouraging them to make the connections. This takes time. By creating the space and showing by example, the entire group progresses -- regardless of where each individual begins.

There is also opportunity to identify and address ethical issues, either by discussion and education or through consultation with Dr. Carl Middleton, CHI's vice president of theology and ethics. This collaboration is evident in the growth of the PSO organization. This organization assists CHI's hospitals and health systems to navigate changing reimbursement systems by negotiating today's payer contracts and capitalizing on tomorrow's risk-based payment opportunities.

As this organization develops, it has worked to ensure consistent ethical practices in the negotiation of all third party payer contracts through an educational effort focused on Contracting Excellence. Under the leadership

of David Stratton, vice president network reimbursement, a curriculum was developed in consultation with the Navigant consulting firm and the Kellogg School of Management at Northwestern University. The curriculum was delivered two days a month in person for seven months.

Stratton, together with Navigant and Kellogg partners, worked closely with the vice presidents of theology and ethics and mission integration for emerging markets to integrate mission, core values and ethics into the full curriculum and case studies, rather than adding these on as a separate unit or module. For example each of the first two days included presentations on Ethics Foundations Part I and Part II lead by Dr. Middleton. Throughout the course, case studies were used or developed to highlight ethical issues and how we would address them in light of who we are as a faith based organization in the context of negotiating third party reimbursement contracts. During role playing of the cases, some of the roles portrayed less than ethical negotiation strategies. This provided rich discussion during the debriefing sessions. As the curriculum progressed we incorporated material that was pertinent to the specific month's curriculum including content on our core values of reverence, integrity, compassion and excellence. The order of presentation of the values depended upon the specific content included in that month's class work. In addition, time was built into the agendas for extended reflections that started each meeting and concluded each day. Throughout the course, participants gained comfort and confidence in articulating ethical and mission concepts in negotiation practices. The Kellogg staff was intrigued with this practice and commented that it

enhanced the program and that they had never seen any other group use this practice.

Conclusion

With the evolution of the Catholic health ministry, CHI has affirmed that health care needs are often community-based and no longer confined within the walls of the acute care hospital. Health care is delivered in doctors' offices, homes, work places, schools and many other sites where people gather. We are moving toward virtual contexts and discerning how to utilize technology to enhance health care delivery without losing the high touch of meaningful, personal relationships.

CHI is exploring strategies that address populations (communities), not only individuals. We are in partnerships that we haven't been in before and creating new business lines that do not reflect traditional experience or competencies. Not-for-profit, for-profit, and business partners that are not Catholic, are common. True to our foundresses, we are moving into and meeting needs that change our context of care and require intentional thought and application. At a time when health care delivery and reimbursement are changing, every aspect of our work is shifting and moving at a faster pace than ever before. Our Catholic tradition does not change, but the contexts within which we live our mission and Catholic identity are changing. Mission and ethics questions are being asked in many new arenas. It is up to us to read the signs of the times and respond as thought leaders.

Although we are privileged to be the first in CHI to fill the role of vice president of

mission integration for emerging markets, we do not serve in this capacity alone. We serve together with our mission group colleagues in theology and ethics, healthy communities, traditional mission integration, and the CHI Center for Formation. As every aspect of the organization, together with many internal and external partners, are traversing the new terrain of rapidly changing health care, we too, are learning what it means to live our mission at negotiation tables, board rooms, homes, ambulances, communities, other countries and virtual spaces. It is an exciting time to be in mission integration and to have the opportunity to help our leaders, both formal and informal, find their voices to translate the ministry into the future.

¹ Sponsorship and Mission Criteria: Evaluation of Business Strategies Process and Tool: Persons responsible for the development of this tool: CHI Members and Board of Stewardship Trustees; Sr. Peggy Martin, OP, Sr. VP, Sponsorship and Governance; Colleen Scanlon, Sr. VP, Advocacy; John DiCola, Sr. VP, Strategy and Business Development; Tom Kopfensteiner, Sr. VP, Mission; Carl Middleton, VP, Theology and Ethics; and the National Mission Group.