TRINITY HEALTH
MISSION DISCERNMENT
MISSION AND CORE VALUES INSPIRE DECISIONS
MISSION
We, Trinity Health, serve together in the spirit of the Gospel as a compassionate and transforming healing presence within our communities.

CORE VALUES

REVERENCE
We honor the sacredness and dignity of every person.

COMMITMENT TO THOSE WHO ARE POOR
We stand with and serve those who are poor, especially those most vulnerable.

JUSTICE
We foster right relationships to promote the common good, including sustainability of Earth.

STEWARDSHIP
We honor our heritage and hold ourselves accountable for the human, financial and natural resources entrusted to our care.

INTEGRITY
We are faithful to who we say we are.

VISION
As a mission-driven, innovative health organization, we will become the national leader in improving the health of our communities and each person we serve. We will be the most trusted health partner for life.
TRINITY HEALTH  
MISSION DISCERNMENT

This Mission Guide has been developed to provide an overview of the method of discernment. Mission discernment is a process that ensures that the Mission and Core Values of Trinity Health inspire good decision making. Through this process we are able to integrate our mission and core values into strategic and management decisions.

Mission discernment aims to create a reflective environment in which individuals and organizations can gain perspective on complex issues. The practice of discernment is found in all traditions. In the Judeo-Christian scriptures, biblical figures sought solitude so as to reflect on past events and future possibilities. Christian writers, such as Ignatius of Loyola, did the same. Today, discernment is taught in business schools as an element of innovation. A reflective environment conducive to discernment requires one set apart from the day-to-day activities of an organization in which adequate time is given to ponder issues without pressure or haste.

Unlike practical problem solving in which an expert confronts issues using previous experience, discernment spans the entire organization. The complexity inherent in discernment is often marked by moral ambiguity over emotionally charged issues. It therefore requires consensual wisdom through shared discovery and honest, albeit emotionally difficult, exploration.

Discernment may be formal or informal. A formal process is used when the outcome will have substantial implications in light of the Mission and Core Values, the Ethical and Religious Directives, and Catholic social practice. On the other hand, all decisions, no matter how small, can benefit from informal discernment. In either case, discernment supplies an environment of public checks and balances and helps navigate the intense emotions that often accompany difficult discussions.
BEFORE THE DISCERNMENT

Choosing discernment participants, who must be able to articulate the perspectives of affected stakeholders, is a critical issue. It is important to note that the process cannot at times involve all stakeholders; in most cases eight to twelve participants are chosen.

Another critical element in setting up a discernment is an understanding of the process and ground rules. The way in which the discernment process differs from strategic planning or other business decisions requires explanation. Also, participants must know that the facilitator’s role is to ensure that all voices are heard. Finally, expectations regarding attendance and the length of the process must be clarified.

Setting ground rules helps participants feel safe so that they can express themselves without retribution. Each participant in turn must be able to speak freely without being interrupted and without fear of being silenced, intimidated, or ridiculed. Further, confidentiality is expected until the discernment has been completed and reviewed by the proper authority.

The discernment group also needs to be clear regarding their scope of authority and understand that they are not the final decision maker. Their role is to clarify the values by which a decision should be made through use of the Essential Elements of Mission Discernment, described below. The group must also understand that the process is not necessarily linear and commonly moves back and forth among its various elements.

ESSENTIAL ELEMENTS OF MISSION DISCERNMENT

Hopes and Fears

A preferred starting point in discernment is exploring the hopes and fears of participants. Identifying anxieties, prejudices, or preconceptions, which might undercut a fair and thorough discernment, is essential. Invariably, participants bring to the discussion top-of-mind conclusions or assumptions about outcomes. To help negate unconscious anxieties and biases that could prejudice the conversation and its outcomes, participants should voice trepidations and preconceptions by exploring questions such as the following:

- What are our hopes and fears about the process and the issue to be discussed?
- What do we believe the outcome of this mission discernment will be and how do we feel about the perceived outcome?

Perspectives

The issues at stake are not always clear until problems are framed and central questions identified. Examining the issue from different perspectives is essential, because each person will perceive and describe it differently. If an issue is inaccurately identified and framed at the outset, then the ensuing discussion and outcome may be inadequate. To avoid such results, participants should consider the following questions:

- How would different parties (eg, patients, clinicians, employees, trustees, the community, the press) frame the issue(s) being discerned?
- How will the issue(s) impact the Mission and Core Values or affect past commitments?
- Can we identify the moral, social, and economic consequences that are likely to emerge for each of the outcomes?
- After the issues have been framed, in what order should we address them?

Stakeholders

Another consideration in the Essential Elements of Discernment is stakeholder identification. Who will be affected positively and negatively by the decision? The manner and degree to which individuals and communities will be affected must be considered, particularly the poor and vulnerable. Questions to be explored include the following:

- How will individuals or groups with interests in the outcome be positively or negatively affected?
- Which individuals and groups are more directly affected by the outcomes, and will their interests be given priority in selecting the final option?

Possibilities

Uncovering and evaluating options is inherent in the Essential Elements of Discernment. Potential solutions and outcomes can be found inside and outside of the organization. The risks associated with inadequate attention to this element are substantial. Relying simply on expertise, drawing too quickly on solutions applied to previous problems, and not looking outside of the industry for innovations can handicap the outcome. To explore possibilities, the following questions should be raised:

- Has the institution ever explored or addressed a problem similar to the one under discernment?
- Have outside organizations confronted similar kinds of issues? If so, what did they do?
- What options exist?
- How do the possibilities help advance the mission?
Ethical Traditions

Considering the possibilities in light of ethical traditions is a means of sorting and ranking options. Within Catholic organizations, special attention should be given to the Catholic moral tradition, including the Scriptures, Catholic social teaching, and Ethical and Religious Directives. Discernment can also be informed by religions and cultures outside of Catholicism, in which long-standing traditions of justice can be found.

Explicit attention to the relevant Mission and Core Values helps in prioritizing solutions. Moral commitments and values that flow from strategic goals and objectives, commitments of the legacy sponsor, and special circumstances also deserve significant attention. Questions that are useful in considering values include the following:

- How do the issues relate to the broad moral tradition, including Catholic social teaching and the Ethical and Religious Directives?
- How do the possibilities either positively or negatively affect the Mission and Core Values and commitments? (Each value should be thoroughly explored.)
- Which options better preserve and protect a majority of the identified values?
- Given the nature of the issue and the interests of those affected, which of these values and commitments should take priority?

Outcomes

A final Essential Element of Discernment is identification of preferred outcomes. Areas of consensus and divergence need to be voiced, with all participants expressing their preferences and the reasons for them. If a consensus cannot be reached, the group should at least report their leanings toward a certain position or unique options that have emerged for which there are no clear preferences. In such cases it is also important to identify whether serious reservations remain which should then be communicated to the final decision maker.

During this conversation, it is helpful to pause and offer time for all participants to reflect on what they are thinking and feeling. Doing so helps to balance reason, emotion, and intuition as well as to understand any serious reservations regarding the direction of the discussion. Questions to be explored include the following:

- Has the discussion been aligned to the Mission and Core Values of Trinity Health, its heritage, and the principles of Catholic social teaching?
- What are the remaining reservations?
- Has each of us had time to express our viewpoints?
- Have we listened attentively to others’ viewpoints?

IMPLEMENTATION

Before communicating the decision arrived at, the discernment group should prepare a plan that delineates the support for the affected stakeholders and the steps needed to implement the decision. Questions to be considered include the following:

- Are there tasks that need to be addressed before approval?
- What person(s) and/or department(s) is (are) responsible for implementing the decision? What is the timeline?
- Who needs to be informed? When? What information needs to be communicated to the various stakeholders?
- How will those who are negatively affected by this decision be supported?

Although the discernment group does not need to communicate an exhaustive list of items discussed, they do need to convey the general rationale for their preferences and how they connect to the Mission and Core Values. They must also explain how the interests of the stakeholders were addressed. The following questions may be considered:

- How does the discernment support and balance Trinity Health’s Mission and Core Values?
- Why was attention given to this issue?
- Why did we focus on certain questions and not others?
- How were diverse perspectives and interests balanced?

Once a plan has been established, practical details must be attended to, including supporting the individuals and groups affected by the outcomes and reviewing and adjusting the plan as needed. Most often these items are addressed by management. The design and implementation of a plan require humility and tentativeness. Solutions to complex and intricate issues require small-scale testing to allow for an adjustment period. A process by which the plan’s effectiveness is evaluated should be established as well. In this way discernment is cyclical and requires a revisiting of the outcomes at a later date specified by the group. Oversight and accountability of the implementation plan is necessary to ensure that the decision is carried out in alignment with the Mission and Core Values of Trinity Health.
MISSION DISCERNMENT GUIDELINES

Elements of discernment apply to all decisions. There is no clear formula for deciding when it is appropriate to use a formal discernment process. There are, however, reliable indicators to assist in determining when a formal discernment process might be used, as follows:

I. Significant impact on:
   • Those we serve (reductions in resources, quality, service)
   • Those with whom we serve (changes in benefits, wages, programs)
   • The community (changes in access, coverage, availability, location)
   • Our ministry (closures, reductions to service lines or departments)
   • The Church (moral cooperation with evil, scandal, Church relations)

II. Conflict with Mission and Core Values:
   • Core Values (closure or curtailment of core services)
   • Catholic Social Principles (human resource issues, policies, strategic planning)
   • Ethical and Religious Directives for Catholic Healthcare Services (ERDs)
     (mergers, acquisitions, partnerships)

III. Complex or novel issue:
   • Significant differences of opinion (disagreement about the central issue, what should be done)
   • Moral uncertainty (unsure whether decision aligns with Mission and Core Values, unclear how issue affects Mission)
   • Significant ambiguity (do not know how to think about an issue, unsure how to begin to address a decision)

Decisions such as major expansions or curtailment of core services require formal Mission Discernment as do mergers, acquisitions, and joint ventures. Daily and technical decisions that are part of routine business do not normally require a formal discernment. Examples include departmental budgeting, regular purchasing, and routine changes and updates in information technology. Some matters may be addressed by engaging Mission Integration at points during a decision-making process.