

IAP2 Core Values Award Submission

Title: Strategic Quest
Award Category: Project
Organization: Capital Health
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The Problem and Challenge

Capital Health is the largest adult health service provider in Nova Scotia. Through a network of hospitals, health centres and community-based programs spread across the Halifax Regional Municipality, Capital Health's 10,000 staff delivers medical and surgical care, mental health care, public and community health programs, addiction prevention and treatment, and environmental health to 400,000 residents. It also provides specialist services to rest of Nova Scotia, and within the Atlantic provinces. In addition, Capital Health, Dalhousie University and the Nova Scotia Community College partner to provide both academic and clinical learning experiences for physicians and health professionals. Capital Health also conducts health research.

Health care continues to consume an ever-increasing share of public funds. As it does the public demands a better return on investment: more accountability, better access to care and services, and better results from investments in drugs, equipment and expertise. The situation at Capital Health in Halifax, Nova Scotia reflects a national reality.

In spite of Capital Health's \$670 million annual investment in care and services each year, the health of the population is not improving, demand for service is increasing, and access to care and services is declining. System sustainability is a serious concern. A low political tolerance for increased public spending, a lack of evidence that more funding will improve health status, aging infrastructure, a globally competitive market for skilled health professionals, and burden of disease and demographic pressures on future health services has created a perfect storm for the health system in this community.

In March 2007 Capital Health launched Strategic Quest in an attempt to bring about a fundamental change to health care in this community. Starting from the belief that a different outcome required a different process, Capital Health applied an unconventional approach to strategic planning. The district was seeking a shift from an illness model of health care to a wellness model. To make this shift the district knew it would need to rebalance resources, but more importantly, it would take a change in the attitudes and accountabilities on the part of health providers and citizens alike. Making this shift will require citizens to shift their attitude from dependency on a system of illness care to shared accountability for their personal health as well as the health of the system in general. Strategic Quest brought together participants from within Capital Health and citizens and stakeholders in the community to address the question: "What would it take to create a world-leading haven for people-centred health, healing and learning?"

The Role of Public Participation

From the outset, public involvement in creating a new future for health care and services in the Capital Health district was paramount. Some of the impetus for making the strategic planning process inclusive and transparent was evidence gathered through a key stakeholder study undertaken on behalf of the incoming CEO in late 2006. The qualitative study conducted on behalf of Capital Health by Corporate Research Associates interviewed 50 local business, political, and public sector leaders. Among other issues, the study found Capital Health to be lacking in the area of openness, transparency and accountability. Among key community leaders, there was a clear message to Capital Health that it needed a strategy to become more welcoming of external input into its decisions and priorities.

In the early phase of Strategic Quest, a series of “sensing teams” (see Participation Methods below) were created to conduct in-depth inquiries in a number of key areas, including a team dedicated to the exploration of a new role for Capital Health within community. Thousands of conversations took place with stakeholders, community organizations, patient families, and staff in pursuit of a more complete understanding of Capital Health’s role and relationship within the community. Capital Health learned six “Inconvenient Truths” about itself from this exploration:

- Capital Health’s approach to health is not holistic.
- Capital Health is not people-centred.
- Capital Health is complicit in the politics of health care.
- Capital Health is not prepared to engage our partners and citizens.
- Capital Health does not empower people or communities.
- Capital Health has lost sight of our academic mission.

(see Project Results below for more information about the ‘Inconvenient Truths’ and their impact.)

Public Participation Methods

The Strategic Quest process used as its strategic planning framework the U-Theory approach developed by Otto Scharmer, a senior lecturer at MIT (<http://www.ottoscharmer.com/>). U-Theory is based on over eight years of scientific research into innovation and leadership through interviews with 150 thought leaders. There are five stages in the U-process: Initiating, Sensing, Presencing, Creating and Evolving. Strategic Quest engaged citizens and stakeholders in the sensing, presencing and creating phases of the process. The U-process provided Capital Health a deep, reflective journey into its work and role in the community. Between April and November 2007 the Strategic Quest (see sensing teams above in Role of Public Participation) engaged over two thousand citizens, stakeholders, patients/client families and staff using a variety of methods, including:

- World Café (www.theworldcafe.com)
- Conversation Circle technology (www.conversationcircle.com)
- Open Space technology (www.openspaceworld.org)
- Scenarios
- One-on-one interviewing
- Promise Councils (see item 5 in *Alignment with IAP2 Core Values* below)
- Patient-family waiting room journals
- Quantitative and qualitative public opinion research
- “Quest on a Cart” (a mobile toolkit for engaging people in Strategic Quest discussions which was used inside the organization and with some external stakeholder organizations)

Uniqueness of the Project

Within the Canadian health care context, there are few examples of this scale of public engagement in strategic planning, priority-setting and decision making at the level of health care organizations. Capital Health looked to the BC Conversations on Health project (www.bcconversationonhealth.ca) for guidance in engaging the public on the issue of health care. As well, Capital Health examined the engagement work undertaken by the National Health Service in the U.K. to help guide its public engagement work through the Strategic Quest process.

This project was demonstrably unique from any examples we were able to research in several ways:

1. We were not able to find instances of health care organizations that employed public participation techniques in the development of strategic plans.

2. The engagement of citizens and a diverse array of community stakeholders helped bring focus to the needed shift from an illness to a wellness model in the delivery of health care and services.
3. Including citizens and stakeholders in the Strategic Quest process has spread a public participation/citizen engagement ethos into decision-making and priority setting inside a health care organization.
4. The Strategic Quest process led to the creation of the Citizenship Promise Council within Capital Health whose mandate has been the development of principles of citizen engagement, research into engagement process and techniques, the development of an engagement framework, and the establishment of a new strategic direction for Capital Health (“Citizen and Stakeholder Engagement and Accountability”).
5. Staff and physicians were engaged both as stakeholders in the system and as citizens in our community. Citizens and stakeholders were engaged as both users and owners of the system.

Project Results

Strategic Quest had a number of important results. Capital Health’s “Inconvenient Truths” came from an extensive sensing process (see above in Public Participation Methods) in which citizens and stakeholders in the health system were engaged in dialogue through the range of engagement techniques noted earlier. These truths were also the impetus for the creation of a Declaration of Health (www.ourpromise.ca) for our community and for Capital Health staff and care providers. This Declaration acknowledges a broader role for Capital Health within community beyond its role as an acute care provider. It was citizen and community input throughout the Strategic Quest process that helped renew the district’s focus on wellness and to articulate a broader definition of health.

With the adoption of the broad directions and findings of the Strategic Quest process by the Capital Health Board of Directors in October 2007, Strategic Quest evolved into Our Promise (www.ourpromise.ca), a unique strategic plan for health care transformation that is focused on health (wellness and promotion), healing (care and service) and learning (creation of knowledge networks to ensure future sustainability and promote innovation).

One of the five strategic directions that emerged as part of Our Promise was solely focused on engaging citizens, stakeholders and our community. As part of its work, the Citizenship Promise Council researched and defined citizen engagement principles (public involvement; participatory decision-making; clarity of purpose and intent; citizen and community capacity building; commitment and accountability; and equity and inclusion). This council also created a framework for engagement that aims to integrate the principles into the day-to-day work of the organization.

Alignment with IAP2 Core Values

The Strategic Quest project aligns with the IAP2 Core Values in a variety of ways:

1. ***The public should have a say in decisions about actions that could affect their lives.*** To honour this value, Capital Health actively engaged citizens and stakeholders in creating a new direction and strategy for health care and wellness in this community. It was felt that if citizens were going to play a role in and take responsibility for their health and transforming the system, they would need to be part of dialogue and decisions that created this new strategic plan. To sustain this value as Our Promise is implemented, a new strategic direction focused on citizen engagement has been embedded into the long-term strategy of the organization, a citizenship framework with guiding principles has been adopted, and initiatives to develop and integrate engagement processes into daily work have been undertaken.
2. ***Public participation includes the promise that the public’s contribution will influence the decision.*** The public contributed directly to the new strategic direction for Capital Health through a series of large-scale public world cafes and other events. These community-level conversations contributed

directly to the focus and direction of the new strategy (Our Promise and the Declaration of Health). As Capital Health moves forward with this strategic plan citizens and stakeholders are being involved in making decisions and setting priorities for health care services and wellness initiatives in this community. For example, an outcome of the engagement strategic direction means Capital Health is designing a public input process to inform the placement and development of Community Health Teams that support local health and wellness. Capital Health is also planning for citizen involvement in the development of future health facilities through a Master Facilities Planning process set for the fall 2008.

3. ***Public participation supports sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.*** One of the significant drivers behind the Strategic Quest process is the growing need to create a healthier population in our community and a health system that is sustainable in the long run. The Strategic Quest sensing teams spent a great deal of time and effort gathering information and perceptions from the many stakeholders and citizens who would potentially be affected by the transformation. The intent of this work was to understand the views and perspectives of patients, families, staff, the community, government, business, and many other interest groups. Experiencing and understanding the unique realities faced by these many stakeholders in their interactions with Capital Health was critical in the development of a strategic plan that was humane, compassionate, and that will ultimately be sustainable.
4. ***Public participation seeks out and facilitates the involvement of those potentially affected by or interested in the decision.*** Capital Health actively engaged thousands of citizens, stakeholders, patients and families, and staff in a myriad of ways. There were large scale open, public events organized at different locations and during different times of the day to ensure that a broad spectrum of participation. Transportation was provided for some sessions. Patients, families and staff were engaged through a variety of face-to-face meetings, journaling in “Open Me” journals that were placed in public waiting rooms throughout our district, formal meetings, conversation circles, “Quest on a Cart,” surveys, and email submissions. Great care was taken to ensure that “hard to reach” audiences (such as mental health consumers, addictions clients, homeless citizens, people living in poverty, new Canadians, African Nova Scotians, etc.) were encouraged to participate in the Strategic Quest opportunities, and to raise issues and concerns relevant to their respective situations. This was done through one-on-one interviews as well as group events held in locations and at times more convenient for the needs of each audience.
5. ***Public participation seeks input from participants in designing how they participate.*** Citizens and stakeholders were able to join a series of six “Promise Councils” that were responsible for engaging in conversations with citizens for the sake of exploring discreet components of Capital Health’s strategic future, and for building strategies and a network to move them forward. The various methodologies for engaging citizens in these conversations was designed within each Promise Council and supported (logistics, tools, etc.) by Capital Health. These were:
 - **Health and Healing:** This stream focuses on strategies to directly address health outcomes, and the design and delivery of interventions and supports to help people realize and sustain changes toward healthy behaviours.
 - **Citizenship:** This stream explores the foundational role of citizenship in relation to health and health care, and addresses the collective rights and responsibilities of citizens focused on our quality of life as a society.
 - **People, Relationships and Well-being:** This stream addresses strategies that sponsor people as the essence of the change Capital Health needed to undertake in pursuit of Our Promise. Its function is to create and sustain the human conditions that support healthy behaviours and healthy living. People hold the power to develop the relationships and strategies that best support their changes in beliefs and behaviour leading to well-being.

- **Performance Excellence:** This stream involves strategies that establish and offer stewardship for organizational excellence, patient safety, fiscal effectiveness and technological enablement required by Our Promise.
- **Innovation and Learning:** This stream focuses on strategies that establish and reward the beliefs, principles, processes, practices and structures associated with the spirit of inquiry, the discovery of new methodologies, the performance of evidenced-based practice and the development of competencies and specialties.
- **Leadershift:** This embodies the strategies directly dedicated to the meaningful transformation of Capital Health, and the underlying shift in beliefs, behaviours, assumptions, values, roles and functions that drive the cultural transformation.

6. **Public participation provides participants with the information they need to participate in a meaningful way.** Capital Health created a standard presentation that was used at the engagement and scenario events which laid out the demographic, fiscal, population health, resource and system sustainability challenges facing the organization and the health system in the community. This presentation, entitled *Tough Medicine*, was the burning platform for the dialogue around change. Capital Health also created a web microsite during the Strategic Quest process where information compiled through the sensing process was held for public review. A second generation of the original microsite (www.ourpromise.ca) continues to provide information and offers opportunities for citizens to participate in ongoing dialogue about Our Promise.

7. **Public participation communicates to participants how their input influenced the decision.** The most visible evidence of participant influence on the decision and outcome of Strategic Quest is Our Promise (www.ourpromise.ca) and the Declaration of Health which articulate the shared accountability and commitment to transformation. In April 2008, Our Promise Strategic Directions further reflected a focused response to the citizen input. Ourpromise.ca is also a vehicle for disseminating information about the strategic plan work and it provides a blog space for residents to comment on the plan and to discuss issues relevant to the plan. The President and CEO of Capital Health has presented the findings of Strategic Quest and the new strategic directions of Capital Health at a number of high profile forums in the community, including a Chamber of Commerce event, a health care leadership forum, and a local forum undertaken by an innovation interest group. These major forums, and other smaller presentations, have reached thousands of key stakeholders, citizens and health interests in this community with Capital Health's transformation message. Follow-up forums are being planned for autumn 2008.

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