



Internal Branding: Defining and Establishing Workplace Values

The process of internal branding at Commonwealth Care Alliance involved two phases:

1. Developing an in-depth assessment of the issue and strategy proposal; critical engagement of employees through face to face group sessions; engagement assessment and recommendations.
2. Integration of the values into the organization through: presentations to all staff; development of leader toolkits; visible manifestation of values through signage, personal take-aways, the formation of an employee values advisory group.

As a result of the campaign, the newly defined values: were incorporated into the employee handbook; became part of the interview process, and were integrated into employee assessment reviews.

Commonwealth Care Alliance

Establishing Workplace Values

Assessment & Strategy for Moving Forward

Situation

As recently as six years ago, Commonwealth Care Alliance had only 64 employees. The company environment was such that everyone knew everyone else; the culture was warm, embracing and supportive. Decisions were often made by consensus. All were united in a common goal of delivering - and supporting the delivery of - a unique, comprehensive, model of care for seniors with Medicare and Medicaid who have complex medical needs; needs not being met under the traditional iteration of managed care.

Reflective of its humble beginnings in 2003, and its self-effacing but passionate focus on its mission, the company was little known within Massachusetts outside of the immediate range of its health care delivery environment. It was well-known and highly respected, however, within the health care policy halls in Washington, DC, to the extent that the new MassHealth Plus Medicare program for dual eligible individuals (One Care) mirrors Commonwealth Care Alliance's model of care.

The size of the company grew incrementally until two years ago when it began to grow more rapidly in anticipation of the launch of the One Care program. In 2011, there were 202 employees. Today, as the One Care program goes live, there are close to 500 employees supporting the company's aggressive participation in the new program, at the same time as maintaining and building its core Senior Care Options program (SCO).

A previously affiliated organization, Commonwealth Community Care, offering a unique specialized interdisciplinary primary care model, that has been caring for individuals of all ages with disabilities since 1988, is now a full partner with (under the umbrella of [?]) Commonwealth Care Alliance. This Boston practice is now expanding into four new communities in Massachusetts to serve individuals with disabilities enrolled in One Care administered by Commonwealth Care Alliance. This expansion requires additional staff and all aspects of business support.

Overall, the current employee base of Commonwealth Care Alliance is diverse--spanning a range of gender, ethnicity and age, and is spread among multiple locations. It is anticipated that there will be a minimum of 600 employees by the end of 2014.

Opportunity

The exponential growth of Commonwealth Care Alliance is an exciting manifestation of recognition of its identity, its commitment to those underserved, and to its success delivery a

unique model of care. This rapid growth also brings with it the need to formalize, document, and reinforce workplace values in order to retain the essence of the character and environment that the company values so highly, and is at the root of its identity and success.

The leadership of Commonwealth Care Alliance now has a wonderful opportunity, as well as a critical need, to coalesce employees around a set of internal values that will guide their daily behavior as they work together to fulfill the company's vision and goals. Those values should reflect who and what the company is, guide the thoughts and actions of all, inspire innovation, and drive commitment to excellence. Alignment with company goals and mission is also critical.

Risks

The company is expanding under a pressured situation – to meet the demands of a competitive marketplace, demonstrate the value of a targeted, high quality, profit-making model, and achieve success on a much broader platform. Its employee base is becoming more and more diversified on many levels including culturally and experientially. Successful navigation of this exciting but challenging situation, at the same time as ensuring delivery of best performance, requires a robust, integrated and motivated effort from the top down.

This effort is made all the more challenging absent an established set of values to dictate the culture and to serve as the cornerstone around which all actions are aligned. Without this unifying, motivating set of standards, there is potential for the development of a fragmented and silo-ed workforce, with little or no unifying 'raison d'être', which ultimately, would not only affect the character and environment of the company but also adversely affect business outcomes.

Objectives

Develop, establish, integrate and monitor a set of internal values to:

- Guide interaction and performance of all employees
- Give all employees a strong sense of who the company is, and what is expected of them
- Contribute to the overall coordinated effort towards achieving the company's goals and its mission of delivering customized care – when and where needed – to improve the health, quality of life, and independence of individuals of all ages with disabilities.

Potential Categories of Values

- Integrity: doing the right thing for the right reasons
- Accountability: taking responsibility for what we do
- Respect: treating each other with insight, understanding and compassion
- Teamwork: working together fairly and collaboratively to achieve the best outcome
- Excellence: striving to perform beyond the expected

- Inspiration: stimulate or motivate yourself and others to be innovative, creative or simply do better

Strategy

Through a collaborative effort:

- **Engage** senior staff and employees to identify the appropriate internal company values
- **Align** the values with corporate goals and mission
- **Integrate** the values into the day-to-day culture of the organization
- **Track and recognize** the adoption and usage of the values

Tactics

- **Engagement**
 - Establish group brainstorming sessions throughout the company led by executives and senior leaders to determine what are the appropriate internal values that will guide all in the company.
 - Give employees a clear message that their input is desired and valued.
 - Position the values as an extension of the corporate mission and the 10 values that govern our business performance with the external world.
 - Establish an expectation that these values will be more than a set of words and a poster in the lunch rooms; rather they will be integrated and enforced.
 - Post-brainstorming sessions, document and fully communicate - through various communication channels - values to all employees
 - Set expectations of next steps regarding alignment, integration and tracking.

By engaging employees in the establishment of these standards, they will have a sense of ownership and of being valued; it will foster pride in themselves and in the company, and they will more likely act as ambassadors of those values and the company going forward. It is important that senior leaders – not just executives – are seen to be part of this process so that there is explicit 'buy-in' at all levels of management. This first step of engagement could be combined with review of corporate goals so that it is apparent from the outset that alignment of values and goals are critical.

- **Alignment**
 - Incorporate values into the mission statement
 - Determine how the values will align with and contribute to the fulfillment of corporate goals. This could be accomplished at the senior leader level.

It is important that the employees have a clear sense of corporate direction and goals so that they can see/determine how they can contribute – guided by the values – to the fulfillment of the goals through their immediate areas of responsibility.

➤ **Integration**

- Once the values are aligned with the goals and mission, each department should engage in brainstorming sessions with their leader to discuss how they can translate the values into actionable form, integrate them into their daily responsibilities, and subsequently contribute to the fulfillment of corporate goals and mission.
- Communicate the values visibly by such methods as: posting on intranet, corporate site, in key areas of the company, mouse pads for each employee, etc.
- Incorporate the values – and examples of their actionable forms – into the employee handbook, recruiting materials, interview process and employee development programs ...

➤ **Tracking and Recognition**

- Establish a means of recognizing employees' "above and beyond" performance vis a vis enacting the values
- Determine a means of reporting 'values violation' – a confidential and open line of communication
- Incorporate enactment of values into employee performance reviews
- Conduct a periodic survey and evaluation to track and monitor the effectiveness of the workplace values efforts. This could be combined with a periodic employee satisfaction survey.

Immediate Next Steps

- Establish framework for initial brainstorming sessions
- Develop supporting material
- Review corporate 3-5 year goals and determine if they will be part of brainstorming sessions
- Determine schedule for sessions
- Establish timeline for rollout and implementation of the full Values Program

##

ESTABLISHING OUR WORKPLACE VALUES

COMMONWEALTH CARE ALLIANCE

HEALTHY IS HARDER FOR SOME. That's why we're here.

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THE WHY?

A valid and heartfelt concern on the part of leadership *and* staff that the explosive growth of Commonwealth Care Alliance would adversely affect the values and culture of the organization, which are at the root of our identity and success.

THE WHAT?

Go to the “Source” – employees – and with their help develop workplace values that will:

- Reflect the essence of what has made the company successful – internally and externally – to date
- Guide internal interactions and performance
- Give all employees a strong sense of company identity, and what is expected of them
- Contribute to the overall coordinated effort towards achieving the company’s goals and mission—of delivering customized care, when and where needed, to improve the health, quality of life, and the independence of individuals of all ages with disabilities

THE HOW?

During October and November 2013, CCA President, Lois Simon, met with over 250 employees throughout all locations:

- Reviewing the current status of the organization, including its successes and challenges
- Engaging employees in a dialogue regarding their experience and evaluation of the organization's culture and its attributes
and
- Encouraging an articulation of “aspirational values and attributes” – ones employees would like to see embedded in the culture

THE OUTCOMES

Overwhelmingly, both long-term and new employees were willing to engage in the discussion and appeared candid in their opinions.

- Two major, interrelated outcomes:
 1. CCA is still a “People First and Foremost” organization – encompassing both employees and CCA members. Not only is this unique culture valued by long-term employees, but has served, in some cases as a motivator for new staff to join the organization.
 2. Wanting to preserve the “People First and Foremost” culture, many were concerned that, given the explosive growth, it could not be sustained without putting in place supporting new policies, procedures and infrastructure.

THE INTERRELATED OUTCOMES

- The first outcome serves as the foundation for identifying workplace values based on cherished experience
- The second outcome articulates organizational shortfalls and aspirational attributes that should be addressed—without which CCA's unique culture cannot be maintained

OUTCOME # 1: DEFINING OUR VALUES

THE ATTRIBUTES OF A “PEOPLE FIRST AND FOREMOST” CULTURE

The same words were repeated time and again at all locations to describe the attributes of the “People First and Foremost” culture employees had experienced and/or perceived at CCA. Those words included:

- Caring
- Respectful
- Integrity
- Trust
- Tolerance
- Passion
- Commitment
- Non-hierarchical
- Excellence
- Collaboration
- Teamwork
- Inspirational

MAJOR ATTRIBUTES

The often repeated attributes of our culture can be drilled down to:

- Integrity
- Collaboration and Caring
- Accountability
- Respect
- Excellence

MAJOR ATTRIBUTES = VALUES

Those major attributes represent the values, as articulated by CCA staff, that establish the framework for interaction between employees, and the standards they would like to meet within the workplace.

THE VALUES: WHAT DO THEY MEAN?

Incorporating many of the other attributes cited by employees:

- **Integrity:** We do the right thing for the right reason, and approach our work with passion, commitment and honesty.
- **Collaboration and Caring:** We work together, listening to and learning from each other, interacting with insight, understanding and compassion, to the benefit of all around us and those we serve.
- **Accountability:** We take responsibility for our mistakes as well as our successes, we admit and learn from our errors, and we help create an environment where the focus is on solving the problems – not laying the blame

THE VALUES: WHAT DO THEY MEAN?

CONTINUED

- **Respect:** We respect each other's privacy, the right to have personal opinions and the ability to grow and develop professionally as a valued employee of Commonwealth Care Alliance.
- **Excellence:** We work to our highest capacity, inspiring each other to explore the best possible approach towards the success of organization and fulfillment of our mission.

VALUES + PROMISE

As laid out, the values can also translate into a Promise

- **I**-ntegrity
- **C**-ollaboration and Caring
- **A**-ccountability
- **R**-espect
- **E**-xcellence

OUR VALUES

Our success is direct result of our workplace values.

So, let's talk about them.

OUR VALUES

Challenge

How do we maintain the collaborative, caring, internal environment that is so much a part of our DNA, and is at the root of our success?

NEXT STEPS

- We are holding this meeting at each of our locations in the next two weeks.
- Review our learnings from our discussions
- Distill your input, and draft work place values
- Review the values with a subset of you (advisory group)
- See where we land
- Our goal: publish and enforce workplace values that will preserve our winning workplace culture

Questions?

ALL STAFF MEETING

JUNE 19, 2014



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AGENDA

- CCA Business Update – Bob Master
- Workplace Values – Lois Simon, David Frohman, Beth Richards
- Space Updates – Nancy Roach
- Questions

OUR WORKPLACE VALUES:

EMBRACING AND
INTEGRATING THEM



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WHY ESTABLISH WORKPLACE VALUES NOW?

A valid and heartfelt concern on the part of leadership *and* staff that the explosive growth of Commonwealth Care Alliance could adversely affect the values and culture of the organization, which are at the root of our identity and success.

WHAT WILL WORKPLACE VALUES DO?

Workplace values will:

- Guide internal interactions and performance
- Give all of us a strong sense of company identity, and what is expected of us
- Contribute to our collective effort towards achieving the company's goals and mission

HOW WERE THE WORKPLACE VALUES DEVELOPED?

Over 250 employees throughout all locations came together during the Fall of 2013 to engage in

- A dialogue regarding their experiences and evaluation of the organization's culture and its attributes
and
- An articulation of “aspirational values and attributes” – ones employees would like to see embedded in the culture

THE OUTCOME: THE ATTRIBUTES TRANSLATE INTO OUR VALUES

The attributes, as articulated by all of us, establish the framework for interaction between employees and the standards we would like to meet within the workplace.

THE OUTCOME: THE ATTRIBUTES TRANSLATE INTO OUR VALUES

These values came from all of you.

Can you guess what they are?

IT'S TIME TO PLAY.....

The Wheel of **Values**

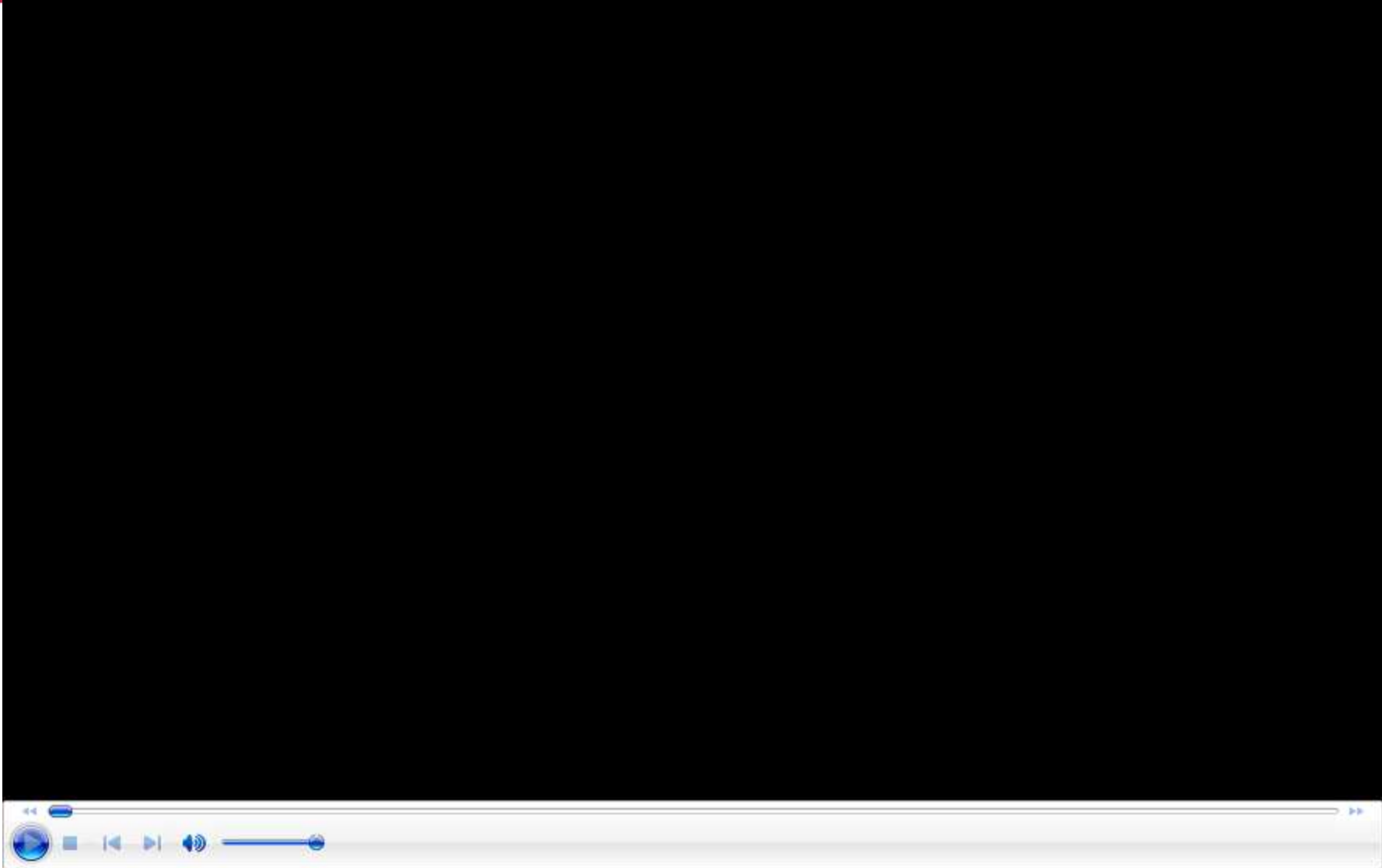
OUR WORKPLACE VALUES

There are five of them:

- Integrity
- Collaboration and Caring
- Accountability
- Respect
- Excellence

THE OUTCOME: THE ATTRIBUTES TRANSLATE INTO OUR VALUES

Let's hear what some of you have to say about CCA's
Workplace Values.



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OUR WORKPLACE VALUES

- Integrity
- Collaboration and Caring
- Accountability
- Respect
- Excellence

WHAT DO THE VALUES MEAN?

Integrity

We approach our work with passion, commitment, and honesty. We always intentionally act in the best interests of our colleagues and members.

WHAT DO THE VALUES MEAN?

Collaboration and Caring

We work together. We listen to and learn from each other, giving and receiving honest feedback, interacting with insight, sincerity, and compassion, to the benefit of all around us and those we serve.

WHAT DO THE VALUES MEAN?

Accountability

We accept responsibility for our work and actions. We take the initiative, deliver on commitments, and own our mistakes as well as our successes; all of which contribute to an empowering environment where the focus is on solving the problems and learning from our errors.

WHAT DO THE VALUES MEAN?

Respect

We treat each other as we would like to be treated. We recognize and respect each other's diversity in all forms, the right to have and express personal opinions, and the ability to grow and develop professionally as a valued employee.

WHAT DO THE VALUES MEAN?

Excellence

We work to our highest ability. We inspire each other to explore the best possible approach towards the success of the organization and fulfillment of our mission, striving for quality, innovation, continuous learning, and excellence in all that we do.

WORKPLACE VALUES



A stylized sunburst graphic in shades of orange and yellow, with rays extending from the bottom right towards the top left, serving as a background for the text.

EMBRACING AND LIVING OUR WORKPLACE VALUES WHAT IS YOUR ROLE?

LIVING OUR VALUES ON A DAILY BASIS

Integrating values into your work

- Each one of you plays an important role: You lead by example
- You collaborate with your coworkers on ways to live our values while at work, and through our work
- You support and promote the values regularly in your daily interactions
- Through your work and behaviors, you embrace and embody the values

LIVING OUR VALUES ON A DAILY BASIS

An Example

Marketing and Communications

WORKPLACE VALUES

I'm glad to know the
"Work Place Values" are aligned
with my own personal values.



Claudia Arnoff

Web Communications Specialist

WORKPLACE VALUES

For these values to work,
we need to know that there are
rewards for embracing them and
consequences for ignoring them.



Scott Howe

Senior Communications Specialist

WORKPLACE VALUES

These values help create an environment that people enjoy working in

Theresa Kaminski

Marketing Intern



WORKPLACE VALUES

We provide a service to other departments:

- Marketing strategy
- Advertising
- Communications materials
- Press Efforts

WORKPLACE VALUES

First reaction:

“Sure, this feels right.”

“This is easy—we live these values in our work already.”

WORKPLACE VALUES

- Collaboration
- Integrity
- Passion
- Accountability

WORKPLACE VALUES

1. Dedicate one staff meeting each quarter to focus on the values.
2. Add a “Values” goal to our individual development plans.
3. Stoke the Passion—commit to remaining open minded, excited, and seeking new ways to communicate.
4. Project planning process: Coming soon.

SUSTAINING OUR VALUES



SUSTAINING OUR VALUES

As Commonwealth Care Alliance employees, we commit to these values to guide decisions, actions and behaviors as we work to fulfill the organization's mission, and help create a positive and successful work place environment

SUSTAINING OUR VALUES



CCAValues@commonwealthcare.org

Speak to your colleagues, your manager.

Speak to Human Resources.

Contact me.

SUSTAINING OUR VALUES

What's your role?

Are you in?



Commonwealth Care Alliance's Workplace Values

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